



Applying Web Model Update 01 for Version 8.4

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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 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
- 8.4 Web Core 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 steps, see



Do not install Web Model 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.

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		

Application	Feature	Requires				
		SNC	Core	Model	BOD Pack	Infor Ming.le
	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:					
	Promotion Failure Notifications <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		
	Two Way Quotes and Sales Orders <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 Model 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-4440	Stages picklist on Sales Process tab is null.
INFORCRM-5148	In the Campaign Summary view, the Targets and Responses lists are empty,
INFORCRM-5555	Pressing the ESC key to close a dialog box opened from a tab, switching to a different tab, and then opening another dialog box causes an error.
INFORCRM-5806	When dragging or dropping a file attachment to a recurring meeting, the error "The data in one or more fields has exceeded its limit. HTTP status: Internal Server Error (500)" occurs.
INFORCRM-5821	On the Opportunity detail view Products tab, after deleting a product, when editing remaining products in the grid the adjusted price and quantity do not display any data.
INFORCRM-5834	In the Edit Product dialog box, after editing the price, the Adjusted Price value is calculated incorrectly upon tabbing into another field.
INFORCRM-5924	When editing a product, editing the Adjusted Price (User) instead of the Adjusted Price (Base) causes incorrect price conversion.
INFORCRM-5928	In the Tickets list view, the date field shows a date 1 day later than the actual date.
INFORCRM-5956	On the Campaign detail view, when updating a selected target to add a response, clicking the Lead Source find button does not return any records.
INFORCRM-5959	When adding an opportunity, removing more than one product causes the Web Client to stop responding.
INFORCRM-5968	When editing a product, after editing the Adjusted Price (User) value, the value entered is doubled upon leaving the field, which also affects the calculated Adjusted Price (Base).
INFORCRM-5992	"An item with the same key has already been added" error occurs when user closes the form by pressing ESC key.
INFORCRM-6005	When copying sales order details to an e-mail, duplicate contact email addresses are added to the To: field.
INFORCRM-6070	On the Defect detail view, when adding a return or ticket that is already associated with the defect, an error occurs.
INFORCRM-6072	When deleting a defect task, an error occurs.
INFORCRM-7073	Text fields added in the Form Designer cannot be populated or edited by users.
INFORCRM-7928	Web Client Library does not display more than 200 folders in the Library.
INFORCRM-8056	User Tasks on the Users list view are not accessible to users that are assigned to the Admin role.
INFORCRM-8131	When emailing the details of a ticket, the My Manager field does not display the signed in user's defined manager.
INFORCRM-8226	A ticket activity end time can be earlier than the start time.

Defect	Description
INFORCRM-10117	The Dashboard funnel widget fails to load opportunity data if the opportunity is associated with a custom sales process.
INFORCRM-10207	If auditing is enabled on TicketSolution or TicketProblem entities, upon updating a ticket's Resolution field, the error ""Unable to cast object of type 'Sage.Saleslogix.Entities.TicketSolution' to type 'Sage.Entity.Interfaces.ITicket'" occurs.
INFORCRM-10772	Importing Leads does not populate the Address Type field even when the Address Type field is mapped to a field in the import file.
INFORCRM-11054	Fulfilling a literature request results in the error 'There was an unexpected error in ExecuteMaiMerge(). There was an Unexpected error. Type mismatch. Details: name=TypeError; number=2146828275'.
INFORCRM-12783	Cannot clear and select Case Sensitive Compare checkbox in the assign condition form.
INFORCRM-13028	When adding an account and contact, braces '{} ' are inserted around the entity ID which causes a 404 error.
INFORCRM-13464	On the Campaign detail view Targets tab, clicking Refresh displays the "unsaved data" message.
INFORCRM-16131	On the Contact detail view, Addresses tab, the Edit Contact Address Description drop-down list only has one option.
INFORCRM-16674	On the Ticket detail view, Ticket Activity tab, the Type and Public columns represent the value of Internal or Customer but in the Ticket Activity grid those columns show the ID values instead of the text values.
INFORCRM-16824	On the Contact detail view, unsaved changes to check boxes do not produce the unsaved data prompt.
INFORCRM-17068	The Office Profile, Groups tab is missing the Save button.
INFORCRM-17071	Using a comma in Area / Category / Issue causes everything after the comma to not display.
INFORCRM-17298	When a SpeedSearch query returns attachments or Library files that are stored in a different domain, a "Page not Found" error displays.
INFORCRM-17995	An opportunity should not be moved to a different account.
INFORCRM-18137	On the Import History details view, the Detail Report common task should be removed.
INFORCRM-18234	Some Administrative roles with View access allow edits to be made.
INFORCRM-18438	In a German environment, in Query Builder Boolean field format results are not translated.
INFORCRM-18490	When resolving duplicate accounts, on the Merge Contacts page if contacts are not merged, the "Next" button finalizes the merge, there is no other page. There should be an additional page with a Merge button as there is when contacts are merged.
INFORCRM-18755	Editing Picklists in Web Client creates duplicate picklist items.
INFORCRM-18987	The word "occurred" is misspelled in multiple strings.
INFORCRM-19007	Unable to schedule an activity on the Contour Account Search view if the Account has double quotes in its name.
INFORCRM-19026	In the web resource file, the string value should be ION Workflow Name.
INFORCRM-19076	When inserting an opportunity, if the account is changed, then the Opportunity Description no longer displays.

Defect	Description
INFORCRM-19101	The string <value>Invalid value for required of type</value> should be <value>An invalid value was provided for one of the supplied parameters</value>.
INFORCRM-19104	Incorrect source text: "Lead has Clicked out the {{Subject}} Link."
INFORCRM-19123	Update strings with "Sales Insights" to "Sales Insight".
INFORCRM-19124	Update string with "Create By" to "Created By".
INFORCRM-19158	(ICBOE) On the Back Office detail view, Custom Price Services tab columns do not sort.
INFORCRM-19206	In a localized environment, the Marketo Leads list view contains untranslated strings.
INFORCRM-19215	If a contract is copied, any changes made to the copied record revert to the values of the original contract.
INFORCRM-19224	When viewing the Insert Product dialog, the Product Variant label is not formatted correctly.
INFORCRM-19261	(ICBOE) When editing an Account Entity, the title of the dialog box should be "Edit Back Office Accounting Entity".
INFORCRM-19267	On the Add Custom Product dialog box, the Pricing fields are not tab enabled.
INFORCRM-19276	In Options, on the User Profile tab, changing the Language Selection should automatically update the Regional Format to a matching region.
INFORCRM-19330	The Return detail view date fields in the right column are missing labels.
INFORCRM-19331	On the Return Ship to Details view, the Special Instructions field is too small for data. Selecting the User Date Stamp option fills the entire dialog box is filled making it impossible to view other information entered.
INFORCRM-19423	The Meeting Regarding picklist contains duplicate items.
INFORCRM-19431	The Quote detail view, Add Products lookup does not include packages.
INFORCRM-19435	Users created in the Windows Administrator do not have access to default groups.
INFORCRM-19437	In a localized environment, the Marketo Leads list view contains an untranslated column heading.
INFORCRM-19442	In the Contract detail view, the tooltips for the Save and Delete buttons display "Contract Details" instead of "Save" and "Delete".
INFORCRM-19508	Unable to add products to opportunities when using Internet Explorer 11.
INFORCRM-19551	In the ION workflow integration edit condition form, Unicode Text fields are not being listed in the entity attribute field.
INFORCRM-19558	In the Offline Web Client Tools, Options, General tab, the "Use Active Reporting (requires ActiveX and Crystal Runtime)" check box is no longer needed and should be removed.
INFORCRM-19566	Unable to add users when there are mismatched values between the APPID column of USERINTEGRATIONMAP and the APPID column of the APPIDMAPPING table.

Defect	Description
INFORCRM-19610	In the Account Hierarchy dialog box, sorting the Account column on the Opportunity tab throws an exception with the following details in the event log: "message": "could not resolve property: AccountName of: Sage.SalesLogix.Entities.Opportunity.", "source": "NHibernate.Persist.Entity.AbstractPropertyMapping, NHibernate, Version=3.3.1.4000, culture=neutral, PublicKeyToken=aa95f207798dfdb4", "type": "NHibernate.QueryException".
INFORCRM-19636	The More tabs tab should not be available on the ION Work Flow view.
INFORCRM-19662	On the Opportunity detail view Sales Processes tab the Sales Process drop-down list is empty when loading the form.
INFORCRM-19671	(ICBOE) If a quote contains more than 700 line items, duplicate BODs are created.
INFORCRM-19692	In a multi-currency environment the What's New Opportunities tab shows currency for the Language selected at sign in, not the opportunity currency.
INFORCRM-19761	In the Entity Manager, the Filters and Metrics tabs labels are missing.
INFORCRM-19800	On the Back Office Integration detail view, Back Offices tab the grid cannot be sorted byVersion.
INFORCRM-19927	In a Visual integrated environment, changing the Account Manager on a contact or account sets the Account Manager to Administrator.
INFORCRM-19937	Update the "Viewing Quote ERP Details Tab" help topic with information for Quote Location.
INFORCRM-19999	In the Check for Duplicates Search Options step, the Type section no longer has a Contacts option.
INFORCRM-20009	In the Quote Detail View, remove the Total and Description fields.
INFORCRM-20084	On the Quote or Sales Order detail view Products tab, Add Custom Product does not add a product.
INFORCRM-20092	On the Quote detail view, clicking the E-mail link causes the error message "No primary email available." to display.
INFORCRM-20101	In the Contacts list view, the contact's Birthdate displays 1 day later than the birthdate in the Contact detail view Details tab.
INFORCRM-20103	The SlxClient portal web.config file is missing the section for setting the Max attachment size.
INFORCRM-20126	In an Oracle environment, selecting the Override the Hosted Help option, adding a new URL and saving the changes causes the error "Infor CRM Error Id: SLXC3E4E5BF8C070888 " to display.
INFORCRM-20133	When editing a product from the Quote detail view Products tab, the Edit Product dialog box display size is too large.
INFORCRM-20142	In the Add or Edit Picklist dialog box, entering special characters in the Name field and then clicking OK or Cancel causes an error to display.
INFORCRM-20177	When exporting to Microsoft Excel, web string is not recognized as a valid DateTime.
INFORCRM-20191	Not-null property references a null or transient value when saving a Ticket.
INFORCRM-20207	On the Defects list view, some filters do not list any items.
INFORCRM-20211	Customer Portal sign in screen shows the wrong copyright year.

Defect	Description
INFORCRM-20287	In a Dutch (European-Asian) environment, the Invoices list view Open group, the Status contains untranslated values and the currency columns display decimals incorrectly.
INFORCRM-20288	In a Dutch (European-Asian) environment, the Receivables list view, All Receivables group, the Status contains untranslated values and the currency columns display decimals incorrectly.
INFORCRM-20322	(ICBOE) In an integrated environment, when merging an account created in an ERP with an account created in Infor CRM, an exception error occurs.
INFORCRM-20364	Users allowed "view" permissions to an administrative action should not be able to make any edits.
INFORCRM-20435	Updating an open opportunity to either Closed-Won or Closed-Lost, increases the Est. Close date by one day and sets the Actual Date to the day before the date the opportunity was closed.
INFORCRM-20456	(ICBOE) Records can be inserted by Back Office extension that allow data with unsafe request form validation characters, causing an Unsafe request pop up message when the record is opened.
INFORCRM-20499	On the Opportunity Sales Process tab the Sales Process and Stages lists do not populate when a sales process is selected in some cases.
INFORCRM-20555	If a lead pushed from Marketo is skipped a SQL exception occurs.
INFORCRM-20591	After updating an account address from the Addresses tab, the Update Matching Contacts Address dialog box may be blank.
INFORCRM-20632	In an Internet Explorer 11 environment, you cannot add products to an opportunity.
INFORCRM-20673	When a group is shared, upon reopening the Share Group dialog box the list is blank.
INFORCRM-20820	On the Quotes Detail view, Products tab, sorting on the Description column causes the list of products to become empty until another column is selected.
INFORCRM-20897	Unable to update the Exchange Rate provider URL in the provider configuration field which is required in order to successfully fetch exchange rates from third party provider fixer.io.
INFORCRM-21046	When performing a Check for Duplicates, the "Finding duplicates please wait" dialog does not update the number of records completed as they are completed.
INFORCRM-21101	Selecting a picklist item to delete, but canceling the deletion when prompted, still deletes the picklist item.
INFORCRM-21131	It may take a long time to display a large list of users.
INFORCRM-21187	After creating a new opportunity, a sales process cannot be selected from the Sales Processes tab until the opportunity has been edited.
INFORCRM-21362	In a Multi-Currency environment, changing an opportunity product Price Level calculates the incorrect Opportunity Adjusted Price.
INFORCRM-21450	Exporting a group with 2 or more of the same column in the layout causes the error "An error occurred requesting job manager. Field is a column or row field. Can't add it to the PageFields collection."
INFORCRM-21679	The Campaign Name and Campaign Description fields should have a field length of 255 characters.

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_Model_Update_01.zip	ICRM v8.4.0 VFS Web Model Update 01.zip	
ICRM v8.4.0 VFS Web Model Update 01.zip	Account.BOEAckStatusNotification.39ece5be2f3e4ef0a92fc8127c7040cf.relationship.xml	
	AccountDistanceSearch.ascx	
	AccountDistanceSearch.ascx.cs	
	AccountDistanceSearch.ascx.resx	
	AccountDistanceSearch.ascx.cs	
	AccountErpDetails.main.quickform.xml	
	AccountErpDetails.main.quickform.xml.*.resx	
	AccountErpDetails.main.quickform.xml.resx	
	AccountHierarchy.ascx	
	AccountMarketoDetails.main.quickform.xml	
	AccountMarketoDetails.main.quickform.xml.resx	
	AccountQuotes.main.quickform.xml	
	AccountQuotes.main.quickform.xml.*.resx	
	AccountQuotes.main.quickform.xml.resx	
	AccountResponses.main.quickform.xml	
	AccountResponses.main.quickform.xml.*.resx	
	AccountResponses.main.quickform.xml.resx	
	ActiveIONWorkflows.main.quickform.xml	
	ActiveIONWorkflows.main.quickform.xml.resx	
	ActiveIONWorkflows.smartpart.xml	
	ActiveIONWorkflows.smartpart.xml.resx	
	AddEditAddress.ascx.cs	
	AddEditBackOfficeAcctEntity.smartpart.xml	
	AddEditBackOfficeAcctEntity.smartpart.xml.*.resx	
	AddEditBackOfficeAcctEntity.smartpart.xml.resx	
	AddEditDefectTask.main.quickform.xml	
	AddEditDefectTask.main.quickform.xml.*.resx	
	AddEditDefectTask.main.quickform.xml.resx	
	AddEditOBMCustomSettings.main.quickform.xml	
	AddEditOBMCustomSettings.main.quickform.xml.*.resx	
	AddEditOBMCustomSettings.main.quickform.xml.resx	
	AddEditPickListItem.ascx.cs	

File Name	File Contents	File Version
	AddEditTargetResponse.ascx.cs	
	AddEditTicketActivity.main.quickform.xml	
	AddEditTicketActivity.main.quickform.xml.*.resx	
	AddEditTicketActivity.main.quickform.xml.resx	
	AddressList.ascx.cs	
	appSettings.config	
	BackOfficeCustomBOEPAService.main.quickform.xml	
	BackOfficeCustomBOEPAService.main.quickform.xml.resx	
	BOEAckStatusNotification.BOEAckSTATUSNOTIFICATION.entity.xml	
	bundleData.xml	
	CampaignSummary.main.quickform.xml	
	CampaignSummary.main.quickform.xml.*.resx	
	CampaignSummary.main.quickform.xml.resx	
	CampaignTargetCreateGroup.ascx	
	CampaignTargets.ascx.cs	
	CampaignTargets_ClientScript.js	
	CommonTasksTasklet.ascx.cs	
	ContactDetails.main.quickform.xml	
	ContactDetails.main.quickform.xml.*.resx	
	ContactDetails.main.quickform.xml.resx	
	ContactDistanceSearch.ascx	
	ContactDistanceSearch.ascx.cs	
	ContactDistanceSearch.ascx.resx	
	ContactExtendedDetails.main.quickform.xml	
	ContactExtendedDetails.main.quickform.xml.*.resx	
	ContactExtendedDetails.main.quickform.xml.resx	
	ContactSearchForDuplicates.ascx.resx	
	ContractDetail.main.quickform.xml	
	ContractDetail.main.quickform.xml.*.resx	
	ContractDetail.main.quickform.xml.resx	
	CopyIONWorkflowMappingRecord.method.xml	
	CopyMultWorkflowMappings.method.xml	
	CopyWorkflowDefinition.method.xml	
	DeDupWizard.ascx	
	DeDupWizard.ascx.cs	
	Default-Class-Saleslogix.Class.codetemplate.xml	
	Dev.filter.xml	
	EditPeriods.main.quickform.xml	
	EditPeriods.main.quickform.xml.resx	
	EditQuoteItem.main.quickform.xml	

File Name	File Contents	File Version
	EditQuoteItem.main.quickform.xml.*.resx	
	EditQuoteItem.main.quickform.xml.resx	
	EditSalesOrderItem.main.quickform.xml	
	EditSalesOrderItem.main.quickform.xml.*.resx	
	EditSalesOrderItem.main.quickform.xml.resx	
	EnableDEXDialog.main.quickform.xml	
	EnableDEXDialog.main.quickform.xml.resx	
	ErpBillToDetails.main.quickform.xml	
	ErpBillToDetails.main.quickform.xml.*.resx	
	ErpBillToDetails.main.quickform.xml.resx	
	ErpExtendedDetails.main.quickform.xml	
	ErpExtendedDetails.main.quickform.xml.*.resx	
	ErpExtendedDetails.main.quickform.xml.resx	
	ErpInvoiceExtDetail.main.quickform.xml	
	ErpInvoiceExtDetail.main.quickform.xml.*.resx	
	ErpInvoiceExtDetail.main.quickform.xml.resx	
	ErpPayFromDetails.main.quickform.xml	
	ErpPayFromDetails.main.quickform.xml.*.resx	
	ErpPayFromDetails.main.quickform.xml.resx	
	ERPPerson.ERPPERSON.entity.xml	
	ErpReceivableExtDetails.main.quickform.xml	
	ErpReceivableExtDetails.main.quickform.xml.*.resx	
	ErpReceivableExtDetails.main.quickform.xml.resx	
	ErpReceivableItemDetails.main.quickform.xml	
	ErpReceivableItemDetails.main.quickform.xml.*.resx	
	ErpReceivableItemDetails.main.quickform.xml.resx	
	ErpReturnDetails.main.quickform.xml	
	ErpReturnDetails.main.quickform.xml.*.resx	
	ErpReturnDetails.main.quickform.xml.resx	
	ErpReturnProductDetails.main.quickform.xml	
	ErpReturnProductDetails.main.quickform.xml.*.resx	
	ErpReturnProductDetails.main.quickform.xml.resx	
	ErpShipmentExtDetail.main.quickform.xml	
	ErpShipmentExtDetail.main.quickform.xml.*.resx	
	ErpShipmentExtDetail.main.quickform.xml.resx	
	ErpShipmentItemDetails.main.quickform.xml	
	ErpShipmentItemDetails.main.quickform.xml.*.resx	
	ErpShipmentItemDetails.main.quickform.xml.resx	
	ErpShipToDetails.main.quickform.xml	
	ErpShipToDetails.main.quickform.xml.*.resx	
	ErpShipToDetails.main.quickform.xml.resx	

File Name	File Contents	File Version
	GeneralSearchOptionsPage.ascx	
	GeneralSearchOptionsPage.ascx.cs	
	GeoCodeProviderConfiguration.GEOCODEPROVIDERCONFIGURATION.entity.xml	
	GetLocationFilterCondition.method.xml	
	GetOpportunityStatusMashup.Method.xml	
	GetProductsFilterCondition.method.xml	
	Global.cs	
	GrandTotal.filter.xml	
	GroupLayout.resx	
	Groups.main.quickform.xml	
	Groups.main.quickform.xml.*.resx	
	Groups.main.quickform.xml.resx	
	InsertAssociationActionItem.WebActionRenderingTemplate.vm	
	InsertContract.main.quickform.xml	
	InsertContract.main.quickform.xml.*.resx	
	InsertContract.main.quickform.xml.resx	
	InsertIONWorkflowDefinition.main.quickform.xml	
	InsertIONWorkflowDefinition.main.quickform.xml.resx	
	InsertIONWorkflowMapping.main.quickform.xml	
	InsertIONWorkflowMapping.main.quickform.xml.resx	
	InsertQuote.btnAddNewAccount_OnClick.method.xml	
	InsertQuote.main.quickform.xml	
	InsertQuote.main.quickform.xml.*.resx	
	InsertQuote.main.quickform.xml.resx	
	InsertQuote.OnLoad1.method.xml	
	InsertSalesOrder.btnAddNewAccount_OnClick.method.xml	
	InsertSalesOrder.main.quickform.xml	
	InsertSalesOrder.main.quickform.xml.*.resx	
	InsertSalesOrder.main.quickform.xml.resx	
	InsertSalesOrder.OnLoad1.method.xml	
	IntegrationBackOffices.main.quickform.xml	
	IntegrationBackOffices.main.quickform.xml.*.resx	
	IntegrationBackOffices.main.quickform.xml.resx	
	IntegrationContourAbout.main.quickform.xml	
	IntegrationContourAbout.main.quickform.xml.resx	
	IntegrationContourAbout.smartpart.xml	
	IntegrationContourAbout.smartpart.xml.resx	
	IntegrationDetail.btnSave_OnClickAction.method.xml	
	IntegrationDetail.main.quickform.xml	
	IntegrationDetail.main.quickform.xml.*.resx	

File Name	File Contents	File Version
	IntegrationDetail.main.quickform.xml.resx	
	IntegrationGeocode.main.quickform.xml	
	IntegrationGeocode.main.quickform.xml.*.resx	
	IntegrationGeocode.main.quickform.xml.resx	
	IntegrationIONWorkFlows.main.quickform.xml	
	IntegrationIONWorkFlows.main.quickform.xml.resx	
	IntegrationUsers.main.quickform.xml	
	IntegrationUsers.main.quickform.xml.*.resx	
	IntegrationUsers.main.quickform.xml.resx	
	InvoiceltemDetail.main.quickform.xml	
	InvoiceltemDetail.main.quickform.xml.*.resx	
	InvoiceltemDetail.main.quickform.xml.resx	
	IONWorkflowDefinition.IONWORKFLOWDEFINITION.entity.xml	
	IONWorkflowDefinition.page.xml	
	IONWorkflowDefinition.page.xml.resx	
	IONWorkflowDefinitionCopy.main.quickform.xml	
	IONWorkflowDefinitionCopy.main.quickform.xml.resx	
	IONWorkflowDefinitionCopy.smartpart.xml	
	IONWorkflowDefinitionCopy.smartpart.xml.resx	
	IONWorkFlowDetails.main.quickform.xml	
	IONWorkFlowDetails.main.quickform.xml.resx	
	IONWorkflowFieldMappings.main.quickform.xml	
	IONWorkflowFieldMappings.main.quickform.xml.resx	
	IONWorkflowMapping.IONWORKFLOWMAPPING.entity.xml	
	IONWorkflowMappingCopy.main.quickform.xml	
	IONWorkflowMappingCopy.main.quickform.xml.resx	
	IONWorkflowMappingCopy.smartpart.xml	
	IONWorkflowMappingCopy.smartpart.xml.resx	
	IONWorkflowMappingDetails.main.quickform.xml	
	IONWorkflowMappingDetails.main.quickform.xml.resx	
	LeadDetails.main.quickform.xml	
	LeadDetails.main.quickform.xml.*.resx	
	LeadDetails.main.quickform.xml.resx	
	LitRequestForm.ascx	
	Login.aspx	
	Login.aspx.resx	
	Logoff.aspx.resx	
	ManageCurrency.main.quickform.xml	
	ManageCurrency.main.quickform.xml.*.resx	
	ManageCurrency.main.quickform.xml.resx	
	ManageStages.ascx.cs	

File Name	File Contents	File Version
	ManageTargets.ascx.resx	
	manifest.xml	
	MarketoInsightDashboard.smartpart.xml	
	MarketoInsightDashboard.smartpart.xml.resx	
	MarketoSalesInsights.smartpart.xml	
	MarketoSalesInsights.smartpart.xml.resx	
	MergeChildren.ascx	
	MergeChildren.ascx.resx	
	MergeRecords.ascx.cs	
	MergeRecords.ascx.resx	
	MergeRecordsConfirmation.ascx	
	MergeRecordsConfirmation.ascx.cs	
	MergeRecordsConfirmation.ascx.resx	
	MergeRecordsConfirmation.smartpart.xml	
	MergeRecordsConfirmation.smartpart.xml.resx	
	MergeRecordsConfirmation_Edit.ascx	
	MergeRecordsConfirmation_Edit.ascx.cs	
	OfficeProfileSettings.main.quickform.xml	
	OfficeProfileSettings.main.quickform.xml.resx	
	OfficeProfileSettings.smartpart.xml	
	OfficeProfileSettings.smartpart.xml.resx	
	OnAfterInsert.method.xml	
	OnAfterUpdate.method.xml	
	OnBeforeInsert.method.xml	
	OnBeforeUpdate.method.xml	
	OpportunitiesOptionsPage.ascx	
	OpportunitiesOptionsPage.ascx.resx	
	OpportunitiesWhatsNew.ascx	
	OpportunitiesWhatsNew.ascx.cs	
	OpportunityClosedLost.cmdCancel_OnClick.method.xml	
	OpportunityClosedLost.lueCompetitorLoss_OnChange.method.xml	
	OpportunityClosedLost.main.quickform.xml	
	OpportunityClosedLost.main.quickform.xml.*.resx	
	OpportunityClosedLost.main.quickform.xml.resx	
	OpportunityProducts.main.quickform.xml	
	OpportunityClosedWon.cmdCancel_OnClick.method.xml	
	OpportunityClosedWon.lueCompetitorReplaced_OnChange.method.xml	
	OpportunityClosedWon.main.quickform.xml	
	OpportunityClosedWon.main.quickform.xml.*.resx	
	OpportunityClosedWon.main.quickform.xml.resx	

File Name	File Contents	File Version
	OpportunityDetails.cmdCopyOpportunity_OnClick.method.xml	
	OpportunityDetails.main.quickform.xml	
	OpportunityDetails.main.quickform.xml.*.resx	
	OpportunityDetails.main.quickform.xml.resx	
	OpportunityDetails.OnLoad1.method.xml	
	OpportunityProducts.main.quickform.xml.*.resx	
	OpportunityProducts.main.quickform.xml.resx	
	OpportunitySalesProcess.ascx.cs	
	OpportunityStatus.mashup.xml	
	PeriodExchangeRate.main.quickform.xml	
	PeriodExchangeRate.main.quickform.xml.resx	
	PickListItems.ascx.cs	
	Potential.filter.xml	
	Product.ProductLocation.03b0eaa680fb476cac0c90b4b298b997.relationship.xml	
	ProductDetails.main.quickform.xml	
	ProductDetails.main.quickform.xml.*.resx	
	ProductDetails.main.quickform.xml.resx	
	ProductLocation.PRODUCTLOCATION.entity.xml	
	ProductLocationView.PRODUCTLOCATIONVIEW.entity.xml	
	ProductMasterDataEnabledView.PRODUCTMASTERDATAENABLEDVIEW.entity.xml	
	QFListBox.WebControlRenderingTemplate.vm	
	QFSDDataGrid.WebControlScriptRenderingTemplate.vm	
	QuickForm2Web.vm	
	QuoteDetails.btnCopy_OnClick.method.xml	
	QuoteDetails.main.quickform.xml	
	QuoteDetails.main.quickform.xml.*.resx	
	QuoteDetails.main.quickform.xml.resx	
	QuoteDetails.OnLoad1.method.xml	
	QuoteErpDetails.main.quickform.xml	
	QuoteErpDetails.main.quickform.xml.*.resx	
	QuoteErpDetails.main.quickform.xml.resx	
	QuoteProducts.main.quickform.xml	
	QuoteProducts.main.quickform.xml.*.resx	
	QuoteProducts.main.quickform.xml.resx	
	ReturnDetails.main.quickform.xml	
	ReturnDetails.main.quickform.xml.*.resx	
	ReturnDetails.main.quickform.xml.resx	
	ReturnShipToDetail.main.quickform.xml	
	ReturnShipToDetail.main.quickform.xml.*.resx	
	ReturnShipToDetail.main.quickform.xml.resx	
	RoleActions.main.quickform.xml	

File Name	File Contents	File Version
	RoleActions.main.quickform.xml.*.resx	
	RoleActions.main.quickform.xml.resx	
	RoleUsers.main.quickform.xml	
	RoleUsers.main.quickform.xml.*.resx	
	RoleUsers.main.quickform.xml.resx	
	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.@.6ca31f10-e98e-4c8c-9b1e-1a9e02633d36.codesnippet.cs	
	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-cf424afb6fa.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.09444607-7a4a-40a4-bcd3-5cb0d451963f.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.a208a60c-1b62-4026-9b4e-8cdb57973919.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.c76519e8-cd6b-4eb8-815f-4d4a30b015c1.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.@.db980b6a-4754-4b0f-8a52-7716d51410a4.codesnippet.cs	
	Sage.SnippetLibrary.CSharp.@.ea481e10-b8ec-4571-8994-3b1c6e764970.codesnippet.cs	
	SalesLogix.resx	
	SalesLogixPortal.resx	
	SalesOrderErpDetails.main.quickform.xml	
	SalesOrderErpDetails.main.quickform.xml.*.resx	
	SalesOrderErpDetails.main.quickform.xml.resx	
	SalesOrderProducts.main.quickform.xml	
	SalesOrderProducts.main.quickform.xml.*.resx	
	SalesOrderProducts.main.quickform.xml.resx	
	SalesOrderProducts.OnLoadHandler.method.xml	
	ScriptDeferFilter.cs	
	SecuredActionRoles.main.quickform.xml	
	SecuredActionRoles.main.quickform.xml.*.resx	
	SecuredActionRoles.main.quickform.xml.resx	
	SendTicketEmail.ascx	
	SendTicketEmail.ascx.cs	
	SetMingleContext.aspx.cs	
	Shared.filter.xml	
	SlxLocation.ProductLocation.d5452e90a06e48a2b694768759060eec.relationship.xml	
	SlxPage.pgtemplate.xml.resx	
	SpeedSearch.resx	

File Name	File Contents	File Version
	StepManageDuplicates.ascx.cs	
	StepProcessRequest.ascx	
	StepProcessRequest.ascx.cs	
	StepSelectFile.ascx	
	SyncHistory.main.quickform.xml	
	SyncHistory.main.quickform.xml.*.resx	
	SyncHistory.main.quickform.xml.resx	
	tenant.config	
	TicketActivities.main.quickform.xml	
	TicketActivities.main.quickform.xml.*.resx	
	TicketActivities.main.quickform.xml.resx	
	TicketActivityItems.main.quickform.xml	
	TicketActivityItems.main.quickform.xml.*.resx	
	TicketActivityItems.main.quickform.xml.resx	
	TicketProblem.Ticket.TICKETPROBLEM.entity.xml	
	TicketSolution.Ticket.TICKETSOLUTION.entity.xml	
	UpdateTargets.ascx	
	UpdateTargets.ascx.cs	
	User.BOEAckStatusNotification.33dfed93b7fb4247a87d96ae35b6846b.relationship.xml	
	UserChangePassword.btnSave_OnClick.method.xml	
	UserChangePassword.main.quickform.xml	
	UserChangePassword.main.quickform.xml.*.resx	
	UserChangePassword.main.quickform.xml.resx	
	UserChangePassword.OnLoad1.method.xml	
	UserProfileOptionsPage.ascx	
	UserProfileOptionsPage.ascx.cs	
	UserProfileOptionsPage.ascx.resx	
	UserRole.USERROLE.entity.xml	
	web.config	

Chapter 2

Applying the Update

2

This Web Model Update affects the following portals:

- SData
- Web Client
- Offline Web Client
- Customer Portal
- SDataCustomerPortal
- SLXJobService



Install the ICRM v8.4.0 VFS Web Model Update 01.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_v840_Web_Model_Update_01.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 **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.

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

Merging Configuration files

If you have customized configuration files, 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).



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 Web Client and/or Web remote Office until after the next Sync cycle.
8. Repeat steps 1-7 for each of the affected portals.

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 8.4.0.01. For more information, and to download the BOD Packs, see KB 1971214 , 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 1974772, available from Infor Xtreme www.inforxtreme.com.

