



Installing Infor CRM Mobile Client

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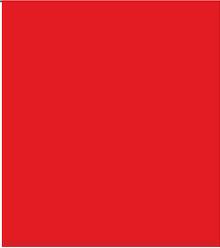
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Introduction



The Mobile Client provides secure, reliable mobile access to your Client Relationship Management information when using mobile devices with internet browsers that support HTML5 and CSS3.

This document provides instructions for installing Infor CRM Mobile Client in an environment where Infor CRM v8.3 and later is already installed.

- Use this document if an earlier version of Infor CRM Mobile Client is not already built and deployed.
- To upgrade an existing installation of Mobile, see the document called *Upgrading Infor CRM Mobile Client.pdf*.

Prerequisites

Before installing Infor CRM Mobile Client, you must:

- Ensure you meet the system requirements. See the Compatibility Guide for the hardware and software required.
- Ensure that you are using a version of Infor CRM that is supported for the features you will be using:
 - For the multi-regional pick lists functionality, ensure the version of Infor CRM is v8.3.0.08 and later.
 - For Mobile functionality, ensure the version of Infor CRM installed is v8.3 and later.
 - If your implementation will include the Back Office Extension feature (ICBOE), the version of Infor CRM installed must be 8.3.0.3 or later with SNC, Web Core, and Web Model Updates applied, and ICBOE enabled in the Infor CRM Web Client.
 - If your implementation will include the Contour feature, the version of Infor CRM installed must be 8.3.0.4 or later with SNC, Web Core, and Web Model Updates applied, and Contour enabled in the Infor CRM Web Client.
- Ensure that you have a functioning Infor CRM Web environment. (This is required even if your Infor CRM implementation is Windows Client only.) See the Implementation Guide for your installed version of Infor CRM for information on setting up a functioning Web environment.
- Have a Web Server with a valid Secured Sockets Layer (SSL) security certificate installed. This can be the Web Server where you deployed your SLX Client portal.
- Have a successfully-deployed SData portal. This means that the following IIS settings have already been configured to use SData:
 - Enable basic authentication.
 - Disable Windows Integration Authentication.

If these settings are not in place, see the Application Architect help file topic called "Configuring the SData and Process Host Portal".

You can confirm that SData is set up correctly by typing the following URL into your browser:
`http://<servername>/sdata/$system/adapters`. Enter the user credentials of the user that SData is configured under (for example, Admin). The adapters page should load and list the available feeds.
For information about troubleshooting your SData portal deployment, see the Application Architect help topic called "Configuring the SData and Process Host Portals".

- Determine if your installation will include Windows Authentication. If so, and you have not already configured Windows Authentication on the SData portal, follow the steps in the Administrator help topic called "Configuring Windows Authentication for Windows Server".
- Understand the Infor CRM Mobile Client installation process. Read this document and develop a plan before proceeding. Understanding the content of the release and planning your installation are key to success.

What You Need to Know

This document assumes you:

- Have a working knowledge of Microsoft Windows operating systems and understand the client/server computing environment, especially networking strategies for networks and remotes.
- Have a strong working knowledge of IIS, Web deployments, and Mobile technology.

Additional Resources

Additional resources and documentation are available on the Infor Xtreme Support Portal web site at www.infor.com/inforxtreme. Help is available in each application.

Other documents that you might find helpful include:

- Compatibility for Infor CRM v8.3 and later is available in the Infor Online Compatibility Matrix (OCM).
 - a. Sign in to the InforXtreme Portal web site: www.infor.com/inforxtreme.
 - b. Expand the **Environment** menu, and then click **Online Compatibility Matrix**.
Click Help for a video explaining the features of the OCM.
- The *Application Architect* Online Help: contains information about building and deploying portals.
- *Applying an Infor CRM Language Pack.pdf* documents are available for each language for which a translated version of Infor CRM is available. These documents explain how to install the files necessary to support a translated Infor CRM database.
- The developer.saleslogix.com/argos web site contains information about customizing Infor CRM Mobile Client.
- The `argos_sample.zip`. Use this file as an example of how to create, save, and apply customizations using recommended practices.
 - <https://github.com/Saleslogix/argos-sample>
 - <https://github.com/Saleslogix/argos-sdk/wiki/Upgrading-1.x-to-2.0>.

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.

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This chapter describes the process for installing, building and deploying Infor CRM Mobile Client.

The order for the process is:

1. Install the Infor CRM Mobile Client bundle.
2. Deploy the Infor CRM Mobile Client portal.
3. Define the default document.
4. Send the Mobile portal URL to your users.

Preparing the Mobile Platform

Before beginning the installation, ensure you meet the system requirements. Refer to the Compatibility Guide available at the customer and partner portal sites.

Installing the Mobile Bundle

Install Mobile on the same server as the SData portal. This is typically the location where the Application Architect is installed. Install the bundle using the Application Architect. Mobile appears as a “SixMobile” portal in the Application Architect Project Explorer under the Portal Manager.

Before beginning this section...

Understand the prerequisites described in [See "Prerequisites" on page 1.](#)

To install the bundle

1. Copy the **ICRM_Mobile_v4_0_0_for_8_3_and_later.zip** to a local folder and extract the zip. Ensure you have Write permissions to the folder where you are saving the zip file. You can check permissions on the Security tab on the folder properties. Ensure the folder path is as short as possible, as there is a 57 character limit.
2. Open the **Application Architect**.
3. In the **Project Explorer**, right-click the project, and then click **Install Bundle**.
4. On the **Select Bundle** screen, under **Path to Bundle**, select the **Filename** option and navigate to the location where you extracted the **ICRM_Mobile_v4_0_0_for_8_3_and_later.zip** and open the **Bundle** folder in step 1.
5. Select **ICRM Mobile v4.0.0 for 8.3 and later VFS.zip** and then click **Open**.
6. On the **Select Items** screen, ensure the **Portals** option is selected.
7. Click **Next**, then click **Finish**.

Enabling Multi-currency on the Mobile Client

If your implementation includes Multi-currency enabled on the Web Client, you must also enable Multi-currency on the Mobile Client.



The Infor CRM Back Office Extension feature requires that Multi-currency be enabled.

Multi-currency is disabled by default. To enable Multi-currency, you must copy a setting from the `products/argos-saleslogix/configuration/production.default.js` file, paste it into the `products/argos-saleslogix/configuration/production.js` file and then edit the setting before deploying the portal.



If you make your edit in the `products/argos-saleslogix/configuration/production.default.js` instead of the `products/argos-saleslogix/configuration/production.js` file, your edits will be overwritten during the next upgrade.

To edit the .js file

1. Open the **Application Architect**.
2. Open the **Project Explorer** and expand the **VFS** folder.
3. Expand the **Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration**.
4. Double-click **production.default.js**.
5. Scroll to the bottom of the file and locate "**multiCurrency**".
6. Copy the setting.
7. Return to **Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration**.
8. Double-click **production.js**.
9. Paste the text you copied in step 6.
The file contains additional instructions to assist you.
10. Change the setting from 'false' to '**true**'.
11. In the Application Architect toolbar, click the **Save All** icon.

Changing the warehouse mode

Available to Promise enables users to see if there is stock on hand. If your implementation includes an integration with a back office that uses a specific warehouse location for the Available to Promise feature, you can enable users to check each warehouse inventory manually.

You must copy a setting from the `products/argos-saleslogix/configuration/production.default.js` file, paste it into the `products/argos-saleslogix/configuration/production.js` file and then edit the setting before deploying the portal.



If you make your edit in the `products/argos-saleslogix/configuration/production.default.js` instead of the `products/argos-saleslogix/configuration/production.js` file, your edits will be overwritten during the next upgrade.

To edit the .js file

1. Open the **Application Architect**.
2. Open the **Project Explorer** and expand the **VFS** folder.

3. Expand the **Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration**.
4. Double-click **production.default.js**.
5. Scroll to the bottom of the file and locate "**warehouseDiscovery**".
6. Copy the setting.
7. Return to **Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration**.
8. Double-click **production.js**.
9. Paste the text you copied in step 6.
The file contains additional instructions to assist you.
10. Insert this line: *** warehouseDiscovery: 'manual'**.
11. In the Application Architect toolbar, click the **Save All** icon.

Enabling Offline Support

Offline support allows read-only access to select records and entities when a user's device is offline or loses connectivity.

Offline support is disabled by default. To enable offline support, you must copy a setting from the products/argos-saleslogix/configuration/production.default.js file, paste it into the products/argos-saleslogix/configuration/production.js file and then edit the setting before deploying the portal.



If you make your edit in the products/argos-saleslogix/configuration/production.default.js instead of the products/argos-saleslogix/configuration/production.js file, your edits will be overwritten during the next upgrade.

To edit the .js file

1. Open the **Application Architect**.
2. Open the **Project Explorer** and expand the **VFS** folder.
3. Expand the **Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration**.
4. Double-click **production.default.js**.
5. Scroll to the bottom of the file and locate "**enableOfflineSupport**".
6. Copy the setting.
7. Return to **Portal Manager, Saleslogix Mobile Portal, SourceFiles, Products, argos-saleslogix, configuration**.
8. Double-click **production.js**.
9. Paste the text you copied in step 6.
The file contains additional instructions to assist you.
10. Change the setting from 'false' to '**true**'.
11. In the Application Architect toolbar, click the **Save All** icon.

Localizing Groups

If your environment has been translated into a language other than English, you must now copy the GroupLayout resx files from the SixClient portal to the SData Integration Host portal for localized groups.



This step is not required in an English language environment.

To copy

1. Open the **Application Architect**.
2. Open the **Project Explorer** and expand the **VFS** folder.
3. Expand the **Portal Manager**, **Saleslogix Client**, **SupportFiles**, **App_GlobalResources**.
4. Select all the of the **GroupLayout.resx** files.
5. Right click the selected files and then click **Copy To...**
6. In the **Browse For Folder** box, click **Make New Folder**, and give the folder the intuitive name of your choice. For example, LocalTemp.
7. Select the folder you just created and then click **OK**.
The resx files you copied will appear in the new folder.
8. In the **Portal Manager**, expand **SData Integration Host**.
9. Right-click **SupportFiles**, select **New Folder**, and name the folder **App_GlobalResources**
10. Right click on the **App_GlobalResources** folder and select **Add Existing...**
11. In the **Open** dialog, browse to the folder you created in **step 6 (LocalTemp)**, select each of the GroupLayout resx files, and then click **Add**.
The GroupLayout resx files are added to the new folder.

Verifying the Port and App Pool are set

Failure to set the Port and App Pool settings for your Mobile portal can cause the site to function as a virtual directory instead of an application. To prevent this, verify that the Port and App Pool are set before deploying the portal.

To verify the Port and App Pool

1. In the **Application Architect View** menu, click **Deployment Explorer**.
2. Expand **Deployments**, and then double-click the **Mobile Portal**.
If this portal is not visible, select Core Portals, right-click IIS, select the Mobile Client portal and then click OK.
3. In the **Deployment Targets** tree view, click **IIS**.
The IIS Target Settings appear.
4. In the **Port** box, ensure that the port number for your Web Host server displays.
It must match the port for the Web site. For example, if you used the default port 3333 during Web Host installation, the port is 3333.
5. In the **App Pool** box, ensure that the name of the application pool for your Web site displays.
6. This name corresponds to the associated application pool for your Web site. For example, if you used the default Infor CRM Web site, the App Pool is Saleslogix.

For more information about setting the Port and App Pools, see *Infor CRM Implementation Guide*.

Deploying the Mobile Portal

You must now deploy the portal added by the bundle, and redeploy your SData portal.

To deploy

1. In the **Application Architect**, open the **Deployment Explorer**.
2. Expand the **Deployments** node.
3. Double-click the **Mobile Portal** deployment.
4. Under **Deployment Targets**, right-click **IIS** and select **Add Portal(s)**.
5. Select **SLXMobile**, and then click **OK**.
6. Do not make changes to the Precompile options as they do not apply to this type of portal.
7. Click **Save**.
8. Deploy the Mobile Portal: right-click **Mobile Portal**, and then click **Deploy**.
9. Deploy the **SData portal**:
 - a. Expand **Core Portals**, **Deployment Targets**, **IIS**.
 - b. Right-click **SData** and then click **Deploy Portal**.

Defining the Default Document

Default documents can be a directory's home page or an index page containing a site document directory listing. The default document for the Mobile Client portal landing page is index.html, and should have been added to the documents list on the IIS Web site by the installation. If your URL <https://YourSixWebServer/SixMobile> is not defaulting to call the index.aspx, you may want to define it manually.

To define the default document

1. In IIS, expand the **Web Sites** directory, and then expand the Web site where you deployed the Six Mobile portal.
2. Right-click the **Six Mobile Portal** virtual directory, and then click **Properties**.
3. Click the **Documents** tab.
4. Ensure the **Enable default content page** check box is selected.
5. Click **Add** to add a new document to the list.
The Add Content Document dialog box appears.
6. In the **Default Content page**: box, type the page name (**Index.aspx**), and click **OK**.
7. Click **Move Up** to move the document to the top of the list.
8. Click **Apply**, and then click **OK**.
9. Reset IIS.
 - a. Click **Start**, and then click **Run**.
 - b. Type **iisreset**, and then click **OK**.

Sending the Mobile Portal URL to Users

Send the Mobile portal URL to mobile users through email. Your users click the URL or type it into a compatible browser on a desktop computer, mobile device, or tablet computer. Any Core product (Windows or Web Client) user can access CRM information from his or her compatible mobile device by clicking the portal link. No specific user configuration is needed.

For security purposes, make sure you set up SSL encryption on the server and access the client using HTTPS. An example URL is: <https://YourSixWebServer/SixMobile>.



The browser may ask users if it is OK to store data on their computer for offline use. This is expected, as the mobile application is cached on the computer for improved performance. After the application has been cached, the user can quickly move from screen to screen because only data needs to be transferred over the wire from the SData portal.

Enabling Mobile Client users to view Back Office information

If your implementation includes Infor CRM Back Office Extension in the Mobile Client, instruct your Mobile Client users to:

- Enable the views for the invoices, receivables, and shipments entities to display on their devices
- Create a group Lookup for each new entity to access Back Office data through the new group Lookups.

Enabling Views

After installing Infor CRM Back Office Extension Mobile Client, Mobile Client users must enable the views for the invoices, receivables, and shipments entities to display on their devices.

To enable views

1. Click the **Global** Menu (hamburger icon).
2. On the **Navigation Bar**, select **Other** > **Configure Menu**.
3. Scroll down and select **Invoices**, **Receivables**, and **Shipments**.
4. In the Menu bar, click the check mark button to confirm your changes.

Creating Group Lookups for an Entity

ICBOE adds access to the following entities using the Mobile Client:

- Invoices
- Quotes
- Sales Orders
- Shipments
- Receivable

The first time each user accesses one of the new entities, he or she will be required to create a Lookup to filter the available records.

To create a group Lookup for an entity

1. Click the **Global** Menu (hamburger icon).
2. Select the **Invoice** entity.
3. Click the **No default group set. Click here to configure groups** hyperlink.
4. Select **All Invoice**.
5. Click the **Check Mark** button to confirm your changes.
6. Repeat Steps 2 through 5 for each new entity.

Back Office information is also available through ERP related data included in Account, Contact, and other views.

Additional Information for Windows Authentication

If your installation includes Windows Authentication, prevent delays in response time by notifying your users that they must use the fully-qualified domain name (FQDN) when they log on. For example: domainname\username.

Alternatively, you can ensure that IIS properties contain the default domain. See the Microsoft documentation for information about setting the default domain name within IIS.

Preventing "Password Invalid" messages during sign in



This task is not necessary when your installation of Infor CRM is version 8.3. with SNC, Web Core, and Web Model Update 04 installed.

When the version of Infor CRM is 8.3 Update 03 or earlier, and Windows Authentication has been enabled, users who exit the Infor CRM Mobile Client by closing the browser instead of by using the Sign Off button may see a "Password Invalid" message the next time they attempt to sign in. This has been observed when using the Microsoft Internet Explorer and Google Chrome browsers to access the Mobile Client. To prevent this, edit the SData portal web.config file.

To edit the SData portal web.config file:

1. Browse to locate the SData portal **web.config** file.
2. Open the file using the text editor of your choice and locate the following text:

```
<!--Windows Authentication-->
<authentication mode="Windows">
<forms name=".SLXAUTH" />
</authentication>
```

3. Delete the line **<forms name=".SLXAUTH" />**
The edited section will read:

```
<!--Windows Authentication-->
<authentication mode="Windows">
</authentication>
```

3. Save and close the web.config file.
4. Redeploy the SData portal.

Enabling single sign-on using Infor Ming.le

Infor Ming.le is an application framework that provides a common user interface for integrated Infor applications. It provides drill-back capability among Infor applications so that users can navigate from one application to another to track transactions, the transfer of data, and report updates.

When Infor Ming.le has been configured for the Infor CRM Web, you can also choose to enable single sign-on for the Infor CRM Mobile Client versions 3.5 and later.

For instructions on enabling Infor Ming.le, see the appropriate document for your environment:

- When Infor CRM is installed in your environment (on-premises) and Infor Ming.le is the Cloud version, see the document named *Integrating Infor CRM with Infor Ming.le - Infor Ming.le Cloud Edition*.
- When both Infor CRM and Infor Ming.le are installed in your environment (on-premises), see the document named *Integrating Infor CRM with Infor Ming.le - Ming.le On-premises Edition*.
- When Infor CRM is the Cloud version and Infor Ming.le is installed in your environment (on-premises), see the document named *Integrating Infor CRM with Infor Ming.le - Infor Ming.le On-premises Edition*.



When both Infor CRM and Infor Ming.le are the Cloud versions, configuring Ming.le is done on your behalf. You will need to add your Infor CRM users to Infor Ming.le. For instructions for adding Infor CRM Client users to Infor Ming.le, see the document named *Adding Infor CRM Users and Dashboards to Infor Ming.le*.

These documents are available from Infor Xtreme: www.inforxtreme.com.

Understanding informational messages

If your implementation includes integration with Infor Ming.le, users may encounter the following informational messages while working in the Infor CRM Mobile Client.

Request for Approval

If Infor Ming.le integration has been enabled and the "Request for Approval" message appears during sign in, instruct users to do one of the following:

- Choose **Allow** to enter the Infor CRM Mobile Client.
- Choose **Don't Allow** to reject the request and be redirected to a 'no access' index page.

Access to Ming.le is about to refresh

Periodically, users may see the following message:

"Access to Ming.le is about to refresh. If you are inserting or editing data, save your changes immediately to avoid data loss."

This occurs when the Infor Ming.le token is about to be refreshed. When this message appears, users are strongly encouraged to save their changes immediately. There is typically a five-minute window between when the warning displays and when the refresh occurs.

Changing the language in which the Infor CRM Mobile user interface displays

Infor CRM Mobile 4.0 includes translated user interface strings for the following languages:

- Brazilian Portuguese
- Dutch
- French
- German
- Global Spanish
- Italian
- Japanese
- Russian
- Simplified Chinese
- Thai
- Traditional Chinese

If your users who want to see the Infor CRM Mobile user interface in one of these languages, they can do so by changing a setting in Infor CRM Mobile. This change affects only the signed in user and is not visible to other users.



Changing the language that displays in the user interface does not change the language used to display data pulled from the Infor CRM database. For instructions on how to install files to support a translated database, see the document named *Applying an Infor CRM Language Pack.pdf*. There is one document for each supported language.

The Infor CRM database can support only one language per installation unless you create customizations to enable multiple languages in such areas as pick lists and groups.

To change the language displayed in the Infor CRM Mobile UI:

1. Sign in to Infor CRM Mobile.
2. Tap the **Global** menu.
3. Expand **Other**, expand **Settings**, and then expand **Language Settings**.
4. Expand the **Language list** and select the preferred language.
5. If desired, expand the **Regional Format** list to specify how dates and times are displayed.

Troubleshooting Localized Group Names

If your environment has been translated into a language other than English, your users may report seeing untranslated group labels.

To enable translated labels to display

1. Ensure that the SData portal has been deployed.
2. Instruct Mobile users to clear the cache on their Mobile devices. Follow the instructions provided by the device manufacturer.
3. Instruct Mobile users to re-select their groups in Accounts, Contacts, Leads, Opportunities, and Tickets.
 - a. Open **Mobile**.
 - b. Open the **Accounts** list view, tap the right menu and in the **Groups** pane, click **Configure**.

- c. Clear all selected groups.
- d. Re-select the desired groups.
- e. Open the list views for Contacts, Leads, Opportunities, and Tickets, and repeat steps **b** through **d**.