



Infor Back Office Connect Administration Guide

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Contents

About this guide.....	13
Intended audience.....	13
Related documents.....	13
Registering to receive Infor Back Office Connect knowledge base e-mail updates.....	14
Contacting Infor.....	14
Chapter 1: Introduction.....	15
Product overview.....	15
Infor Back Office Connect applications.....	16
Infor Back Office Connect documentation.....	16
Navigation and user interface.....	17
Chapter 2: Preparing for the Infor Back Office Connect installation.....	19
Pre-installation tasks checklist.....	19
Retrieving your Salesforce.com organization ID.....	19
Getting Infor Back office Connect logical ID and ION tenant information from Infor.....	20
Enabling multiple currencies.....	21
Creating Infor Back Office Connect profiles.....	21
Creating required Infor Back Office Connect users.....	24
Enabling quotes.....	27
Enabling social networks for accounts and contacts.....	27
Chapter 3: Infor Back Office Connect installation.....	29
Installation tasks checklist.....	29
Purchasing the Infor Back Office Connect app from the Salesforce AppExchange.....	29
Installing Infor Back Office Connect.....	29
Confirming the Infor Back Office Connect package installation.....	30
Chapter 4: Infor Back Office Connect configuration.....	33
Key configuration concepts.....	33
Recommended Inbound Batch Scope values for initial data load.....	33
Understanding price books.....	34
Understanding unit group processing in Infor Back Office Connect.....	34
Understanding many-to-many configuration settings.....	36
Post-installation tasks checklist.....	39
Enabling feed tracking for sync failure notifications.....	40
Configuring the Infor Back Office Connect application for ERP integration.....	40

Configuring multiple currencies.....	58
Enabling history tracking for standard objects.....	59
Performing the initial data load.....	59
Publishing code definitions from ERP.....	60
Configuring reports.....	61
Disabling reports for custom objects (optional).....	62
Creating and modifying page layouts for an Infor Back Office Connect read only user (optional).....	62
Creating an Infor Back Office Connect read only account page layout.....	62
Removing new buttons from account-related lists on the read only account page layout.....	63
Creating an Infor Back Office Connect read only contact page layout.....	64
Removing new buttons from contact-related lists on the read only contact page layout.....	64
Creating an Infor Back Office Connect read only bill-to page layout.....	65
Removing new buttons from bill-to related lists on the read only bill-to page layout.....	66
Creating an Infor Back Office Connect read only pay-from page layout.....	67
Removing new buttons from pay-from related lists on the read only page layout.....	67
Creating an Infor Back Office Connect read only ship-to page layout.....	68
Removing new buttons from ship-to related lists on the read only page layout.....	69
Eliminating optional master data dependency.....	69
Address line validation rules (optional).....	70
Account and contact object address line validation rules.....	71
Bill-to, pay-from, and ship-to object address line validation rules.....	72
Chapter 5: Infor Back Office Connect customization.....	73
Understanding the reasons for customizing Infor Back Office Connect.....	73
Understanding the Infor Back Office Connect objects used to modify default BOD XML documents.....	74
Overview of Infor Back Office Connect BOD mapping documents.....	74
Viewing inbound messages.....	75
Modifying the BOD XML for an inbound message.....	77
Modifying outbound messages.....	77
Modifying the BOD XML for an outbound message.....	78
Customizing Infor Back Office Connect.....	79
Customizing inbound messages.....	80
Customizing outbound messages.....	89
Configuring conditional outbound message processing.....	92
Working with Infor Back Office Connect BOD objects.....	94
Marking inbound messages for reprocessing.....	94
Marking outbound messages for reprocessing.....	95
Viewing BOD type names.....	96
Viewing the BOD type version number.....	96
Updating the BOD Version ID or BOD Release ID.....	97
Viewing BOD field mappings in Infor Back Office Connect.....	97
Viewing BOD entity mappings in Infor Back Office Connect.....	99

Viewing inbound messages in Infor Back Office Connect.....	100
Viewing outbound messages in Infor Back Office Connect.....	101
Viewing outbound transactions in Infor Back Office Connect.....	102
Viewing the configured BOD message sources.....	102
Viewing outbound confirm BODs.....	103
Chapter 6: Any BOD.....	105
Creating Any BODs.....	105
List of required object fields for any BODs.....	105
Any BOD reference package.....	106
Creating a BOD type for the Sync, Acknowledge, Show, and Process BODs.....	107
Creating a BOD entity mapping for an Any BOD.....	108
Mapping the BOD type version.....	109
Mapping BOD field mappings for Any BOD.....	111
Mapping the BOD type version to the message source.....	111
Adding a message source entity.....	112
Creating a custom handler and configuring the handler name in the BOD Entity Mapping.....	112
Creating a sample any BOD trigger.....	117
Chapter 7: Multi-company installation and configuration.....	119
Installing the multi-company reference package.....	119
Understanding accounting entity mapping.....	120
Navigating the accounting entity table.....	121
Choosing a deployment scenario.....	122
Creating a public group.....	122
Understanding the sample trigger.....	123
Adding the standard objects sample trigger to Infor Back Office Connect.....	123
Adding the custom objects sample trigger to Infor Back Office Connect.....	125
Creating a sharing rule for a simple deployment scenario.....	128
Creating a sharing rule for a complex deployment scenario.....	128
Setting objects to private for a simple or complex deployment scenario.....	129
Assigning a role hierarchy.....	129
Understanding the unique ID.....	130
Modifying the Infor Back Office Connect page layout to add the message source lookup.....	131
Adding the user default message source to the user page layout.....	132
Configuring the default message sources for users.....	132
Determining the required message sources for users.....	132
Creating the default message source pick list values.....	133
Setting the default message source for a user.....	133
Adding the lookup filter to a lookup object to include message source.....	134
Adding fields to the search layouts for the account and contact objects.....	135
Filtering standard field lookups for message sources.....	136

Adding a filter to standard field objects.....	136
Adding multi-company validation rules to lookups (optional).....	137
Setting validation rules for a lookup.....	139
Setting validation rules for ERPs that do not support shared records between accounting entities.....	140
Chapter 8: Multiple back office configuration.....	141
Multiple back office configuration tasks.....	141
Creating a document flow for each BOD noun and ERP.....	142
Adding an application to an activity.....	142
Adding documents to the activities.....	142
Add routing to the document flow.....	142
Setting the top and bottom applications' routing.....	143
Adding a routing condition to the applications.....	143
Creating the first and second condition builders.....	143
Selecting the condition branches.....	144
Configuring message source settings for multiple back office integration.....	144
Chapter 9: Upgrading.....	147
Overview of Infor Back Office Connect 10.8 compatibility.....	148
Infor Back Office Connect pre-upgrade checklist.....	149
Confirming the Infor Back Office Connect version number.....	150
Downloading the Infor Back Office Connect release notes.....	150
Stopping the scheduler.....	151
Verifying whether the scheduler is stopped.....	151
Upgrading Infor Back Office Connect.....	151
Post-upgrade tasks checklist.....	153
Understanding the data migration process for the Infor Back Office Connect 10.8 upgrade.....	154
Migrating existing data to Infor Back Office Connect version 10.8.....	154
Updating custom object page layouts for Infor Back Office Connect version 10.7.....	155
Verifying existing data content for Infor Back Office Connect version 10.8.....	161
Updating the Infor Back Office Connect logo for Infor Back Office Connect version 10.8.....	161
Migrating units of measure (optional).....	162
Chapter 10: Creating a customized quote PDF template.....	165
Enabling development mode for the user creating or editing Visualforce pages.....	165
Installing the Custom Quote PDF Reference package.....	166
Confirming the components installed with the Custom Quote PDF Reference package.....	166
Confirming the installation of the customPDF static resource file.....	167
Confirming the installation of the QuoteDocumentController1 Apex class.....	167
Confirming the installation of the QuoteToPagePDF1 Visualforce page.....	167
Replacing the default quote PDF logo with your company logo.....	168

Downloading the customPDF static resource file to a local drive.....	168
Replacing the default logo in the custom PDF static resource file.....	169
Updating the custom PDF static resource file in Infor Back Office Connect.....	169
Updating the custom quote PDF Visualforce page to reference your custom company logo.....	170
Validating the custom logo is displayed in quote PDF output.....	171
Configuring Infor Back Office Connect to use the custom quote PDF Visualforce page.....	171
Verifying the custom PDF Visualforce page configuration.....	172
Defining properties for the custom quote PDF Visualforce page custom.css file.....	172
Changing the font weight of a style element.....	173
Changing the font size of a style element.....	174
Changing the text-transform property of a style element.....	175
Changing the background color of a table header.....	177
Changing the font family defined of a style element.....	178
Changing the text-align property of a style element.....	179
Changing the font style property of a style element.....	180
Changing the color of a text element.....	181
Changing the padding property of an element.....	182
Adding a block of static text to the QuoteToPDFPage1 Visualforce page.....	184
Adding multiple sections to the QuoteToPDFPage1 Visualforce page.....	185
Adding nested sections to the generated quote PDF.....	186
Adding custom fields to the generated quote PDF.....	188
Adding custom field sets to the generated quote PDF.....	190
Recovering the original quote PDF document template.....	191
Uninstalling the Custom Quote PDF Reference package.....	192
Chapter 11: Infor quote migration.....	193
Before beginning the migration process.....	193
Infor quote migration task sequence.....	194
Overview of the quote migration process.....	195
Synchronized ERP quotes and the Infor Back Office Connect Migration application.....	196
Understanding quote record types assignments in Infor Back Office Connect version 10.8.....	197
Setting the Infor Quote record type as the default record type for the System Administrator user.....	197
Installing the Infor Back Office Connect Migration application.....	198
Accessing the Infor Back Office Connect Migration application.....	199
Understanding the Infor Back Office Connect Migration application.....	199
Working with the Migration Objects tab.....	200
Working with the Migration Errors tab.....	209
Working with the Infor Back Office Connect Migration tab.....	209
Migrating quote data to the Infor quote object.....	211
Migrating addresses on Quote records.....	211
Preparing Infor Back Office Connect for the Infor quote migration.....	211
Executing the initial quote data migration.....	212

Post Infor quote migration tasks.....	213
Deleting all Infor Back Office Connect Migration application working objects from the organization.....	214
Integration settings to support regular quote and opportunity business processes.....	219
Users and Quote Record ownership.....	220
Non-Infor quote record clean-up on Infor quote object.....	221
Re-implement Quote and Opportunity custom workflows, approval processes, and triggers for use with the Infor quote object.....	223
Permanently delete standard Salesforce Quote records from the Salesforce Quote object.....	223
Migration errors.....	224
Reviewing and resolving error details for records that fail to migrate.....	224
Rerunning the quote migration after fixing record errors.....	225
Uninstalling the Infor Back Office Connect Migration application.....	226
Chapter 12: Uninstallation.....	227
Preparing to uninstall Infor Back Office Connect.....	227
Stopping the scheduler to uninstall Infor Back Office Connect.....	227
Reassigning standard profiles to Infor Back Office Connect users.....	228
Deleting Infor Back Office Connect profiles.....	228
Uninstalling the Infor Back Office Connect package.....	228
Chapter 13: Data management.....	231
Understanding message processing status codes.....	231
Marking variation conflict BODs as successful.....	232
Reprocessing inbound BODs.....	232
Purging messages from the Infor Back Office Connect message queue.....	233
Chapter 14: Error logging.....	235
Setting the error logging level and number of log messages.....	235
Downloading and deleting the error log.....	236
Downloading the error log.....	237
Deleting the error log.....	237
Working with the error log list.....	237
Creating a custom logger.....	238
Changing the owner of an error message.....	238
Editing a logger.....	239
Deleting a logged error message.....	239
Chapter 15: Territories.....	241
Viewing territories.....	241
Creating territories.....	242
Modifying a territory.....	242

Deleting a territory.....	242
Chapter 16: Troubleshooting.....	245
Common failure scenarios.....	245
ION Adapter Connection test fails.....	245
ION integration scheduler is down.....	246
Batch Apex job fails.....	247
InboundMessageBatch job is not displayed in the Apex Jobs list.....	248
OutboundMessageBatch job is not displayed in the Apex Jobs list.....	248
Verifying the status of Apex Jobs.....	248
Inbound message processing unable to obtain exclusive access to a record.....	249
Salesforce storage usage is over limit.....	249
ION Connect and proxy tenant names do not match.....	249
NO_ROUTE_FOUND error.....	250
Account or contact record will not publish.....	250
Common Apex error messages.....	250
Setting the Infor Back Office Connect Opportunity page layouts for the Opportunity layout master record type.....	254
Assigning the Infor Back Office Connect Opportunities page layout to the Opportunity layout master record.....	254
Assigning the Infor Back Office Connect ERP Opportunities page layout to the Opportunity layout master record.....	254
Cloning ERP Quotes owned by sales users.....	255
Increasing External ID field capacity.....	255
Verifying the number of External ID fields for the Account object.....	255
Verifying the number of External ID fields for the Contact object.....	256
Appendix A: Understanding BODs.....	257
Messaging through BODs.....	257
Generating BODs.....	259
Understanding the execution flow of BOD processing by the Infor Back Office Connect scheduler.....	259
Posting Chatter feeds for BOD sync failure notifications.....	260
Key concepts and terminology.....	261
BODs.....	261
BOD nouns.....	261
BOD verbs.....	262
BOD type names.....	264
BOD type versions.....	264
BOD field mappings.....	264
BOD entity mappings.....	265
Message source.....	265
Message source BOD type version.....	265

Inbound messages.....	266
Outbound messages.....	267
Outbound transactions.....	267

Appendix B: Object permission settings for Infor Back Office Connect user

profiles.....	269
Recommended object permissions for Infor Back Office Connect User profile.....	269
Recommended object permissions for Infor Back Office Connect Administrator and Developer profiles.....	272

Appendix C: Standard object custom fields.....277

Account object custom fields.....	277
Contact object custom fields.....	279
Leads object custom fields.....	281
Opportunities object custom fields.....	281
Products object custom fields.....	282
Quotes object custom fields.....	283
Quote line item object custom fields.....	285

Appendix D: Custom objects and tabs.....289

Custom objects.....	289
Controlled custom objects.....	289
Account contact role and address sync.....	290
Address custom object.....	290
Account contact role custom object.....	290
Custom tabs.....	291
Custom object definition details.....	291
Account Contact Relationship object.....	291
Accounting Entity Table object.....	292
Address object.....	293
Message Source object.....	294
Message Source BOD Type Versions object.....	295
Bill-to object.....	296
Bod Entity Mapping object.....	298
Bod Field Mapping object.....	299
Bod Type object.....	300
Bod Type Version object.....	301
Classification Code object.....	302
ConfigCategory object.....	303
ConfigCategoryProp object.....	303
Contact Bill-to Role object.....	304

Contact Messenger object.....	305
Contact PayFrom Role object.....	306
Contact Shipto Role object.....	306
Customer Return object.....	307
Customer Return Line object.....	310
Inbound Message object.....	311
Infor quote object.....	313
Infor quote Clone Setting object.....	317
Infor quote Line Item object.....	318
Invoice object.....	321
Invoice Line object.....	324
Logger object.....	326
Lookup object.....	327
Lookup Category object.....	328
Outbound Confirm BOD object.....	328
Outbound Message object.....	329
Outbound Transaction object.....	330
Pay-from object.....	331
Person object.....	333
Price List object.....	334
Quote Document object.....	335
Receivable object.....	336
Receivable Line object.....	340
Sales Order object.....	341
Sales Order Line object.....	345
Ship-to object.....	348
Shipment object.....	349
Shipment Line object.....	352
Social Media object.....	354
Territory object.....	355
Warehouse object.....	356
UOM Object.....	356
Unit Group object.....	357
zz_Account Bill-to Role object.....	358
zz_Account Ship-to Role object.....	359
zz_BillTo-PayFrom Role object.....	359
zz_Carrier Party object.....	360
zz_Classification Code object.....	361
zz_Sales Order Address object.....	361
zz_Serial Lot object.....	362
zz_Ship-to Bill-to Role object.....	363
zz_Shipto-Carrier Party Role object.....	364

Contents

zz_Transaction Address object.....	365
Glossary.....	367

About this guide

This guide includes tasks that you must complete in your Salesforce organization before you install Infor Back Office Connect. The guide also includes information about how to install and configure Infor Back Office Connect, including information to help you plan for and prepare your Salesforce organization for an Infor Back Office Connect implementation. Administration topics and instructions to upgrade, uninstall, and troubleshoot Infor Back Office Connect are also provided.

Intended audience

This guide is intended for certified Salesforce administrators with experience in user management, security, workflow, approvals, and reporting.

At minimum, we recommend that the Infor Back Office Connect system administrator complete the Salesforce Administration Essentials for New Admins (ADM201) training or equivalent. Additional experience with advanced analytics, automation, and the use of complex functions is also encouraged. Contact Salesforce services for information on Salesforce training and certification.

We also recommend that Infor Back Office Connect system administrators have experience in XML messaging, Business Object Documents (BOD), Infor ION Connect integration, and basic knowledge of writing Salesforce Object Query Language (SOQL) queries.

Related documents

Additional documentation is available in the product documentation section of the Infor Xtreme Support portal, as described in "Contacting Infor".

- *Infor Back Office Connect BOD Mapping (Inbound)*
- *Infor Back Office Connect BOD Mapping (Outbound)*
- *Infor Back Office Connect User Guide*

Registering to receive Infor Back Office Connect knowledge base e-mail updates

We recommend that you check the support portal web site periodically to download software, patches, and upgrades, to search the Infor Back Office Connect product knowledge base (KB), and to access and print release notes and documentation. You must sign up for the Infor Back Office Connect mailing list to receive e-mail notifications related to Infor Back Office Connect products.

To register to receive Infor Back Office Connect knowledge base e-mail updates:

- 1 Open a web browser.
- 2 Enter the URL for the Infor Xtreme Support portal login screen: <http://www.inforxtreme.com/allogin/allogin.aspx>.
- 3 Specify the e-mail address and password for your Infor Xtreme user account.
- 4 Click **Login**. The Infor Infor Xtreme Support Home Page is displayed.
- 5 Select **Knowledge Base > Search**. The KB Search page is displayed.
- 6 In the Available Product Lines list, select **Salesforce** and click **Add**.
- 7 In the **Search For** field, specify the Infor Back Office Connect KB number **1149054** and click **Search**.
- 8 Locate Infor Back Office Connect Release Updates in the search results and click Sign up. A confirmation message is displayed.
- 9 Locate Infor Back Office Connect Documentation in the search results and click Sign up. A confirmation message is displayed.
- 10 Click **Close**.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

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.

This chapter describes the purpose of the Infor Back Office Connect application and the business solutions that it provides. It introduces the system components and concepts associated with the process of installing and configuring Infor Back Office Connect including users, profiles, objects, settings, and permissions. This chapter also includes an overview of the Infor Back Office Connect BOD integration process.

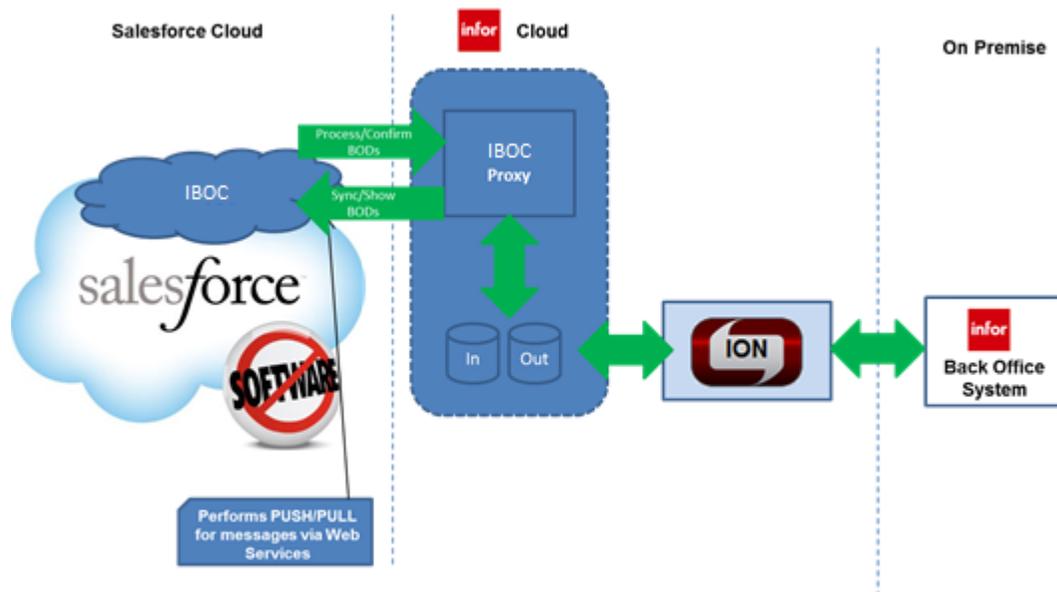
Product overview

The Infor Back Office Connect application integrates Salesforce.com Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) solutions to provide users with the ability to leverage the power of shared information and common processes between the different systems.

Infor Back Office Connect provides a number of custom profiles to access back-office (ERP) information within Salesforce including current Master Data for Customers, Contacts, Products, and Historical Transactional Data for Quotes, Sales Order, Shipments, Invoices, Payments, and Customer Returns.

Communications between Infor Back Office Connect and ERP are sent as business object documents (BOD) that are routed through Infor ION Connect, an enterprise messaging system for integrating Infor applications with each other and with outside applications.

This diagram shows a high-level illustration of a Salesforce and ERP integration using Infor Back Office Connect:



Infor Back Office Connect applications

Infor Back Office Connect consists of two core applications: the Infor Back Office Connect user application and the Infor Back Office Connect Administration application. Both applications are installed during the Infor Back Office Connect installation process and are accessible from the Force.com **App** menu in Salesforce. See "Force.com App Menu" in the *Infor Back Office Connect User Guide*.

Infor Back Office Connect documentation

Infor Back Office Connect documentation provides procedure-based instructions on how to complete tasks associated with system functions and features. Each procedural task provides field descriptions for only the fields that are non-intuitive in their meaning and purpose. For example, most name and date fields are self-explanatory and descriptions are not provided.

Navigation and user interface

Salesforce.com includes several menus and options for navigating to quickly and easily find the pages and information you need. Navigate through the system by clicking icons, menus, buttons, tabs, and hyperlinks on each page.

The *Infor Back Office Connect User Guide* provides information on the documentation conventions used to describe user interface elements and system navigation. See "Basics" in the *Infor Back Office Connect User Guide*.

Note: The navigation instructions presented in this document are based on the Salesforce New User Interface Theme being enabled in the Setup > User Interface section of the Summer'14 release.

Preparing for the Infor Back Office Connect installation

2

Before installing the Infor Back Office Connect application, you must prepare your Salesforce organization for the Infor Back Office Connect installation. This chapter provides detailed information on the pre-installation tasks and procedures you must complete before you install Infor Back Office Connect.

Pre-installation tasks checklist

This checklist includes the list of pre-installation tasks you must complete before installing Infor Back Office Connect. See the appropriate section of this guide for detailed instructions on how to complete these tasks.

We recommend that you complete the pre-installation tasks in this order:

- Retrieve the Salesforce organization ID for the organization on which you are installing Infor Back Office Connect
- Get Infor Back Office Connect logical ID and ION tenant information from Infor
- Enable multi-currency (if your organization requires the use of multiple currencies)
- Increase External ID field capacity
- Create and assign Infor Back Office Connect profiles
- Create required Infor Back Office Connect users
- Enable quotes for your Salesforce organization
- Enable social networks for accounts and contacts

Retrieving your Salesforce.com organization ID

To install Infor Back Office Connect, you must have an Infor Back Office Connect Logical ID and an Infor ION Tenant for your Salesforce.com organization. To get the Logical ID and ION tenant, you must provide Infor customer support with your Salesforce.com organization ID. See "Getting Infor Back office Connect logical ID and ION tenant information from Infor" on page 20.

To retrieve your Salesforce.com organization ID:

- 1 Select **Setup**.
- 2 In the sidebar column, select **Administration Setup > Company Profile > Company Information**.
- 3 In the Organization Detail section, locate the **Salesforce.com Organization ID** field and copy the code displayed.

Getting Infor Back office Connect logical ID and ION tenant information from Infor

To install and configure Infor Back Office Connect, you require an Infor Cloud tenant which is used to establish the integration of Infor Back Office Connect and ERP through Infor ION Connect. Your ION tenant includes the connection point information required to configure Infor Back Office Connect to communicate with the ION proxy server. The ION proxy server houses the proxy container in ION to which messages are published and the proxy server that interacts with the Salesforce adapter that manages the sending and receiving of messages to and from ERP.

During the post-installation configuration process, you will need the details of your ION Service and Infor Back Office Connect application to configure ION Connect connection points and the Infor Back Office Connect adapter and scheduler settings to enable communication between your integrated applications.

To get your Infor Cloud tenant details, contact Infor customer support and provide this information:

- Primary Contact Email Address for your company.
- Company/customer name, for example, ACME Corp.
- Salesforce Organization ID.
- If this is a production or non-production Organization.
- Country and Region information of the location of your company. This information is required to create the tenant in the correct region for optimal data transfer performance.

See "Contacting Infor".

Infor customer support generates your Cloud tenant information and provide you this information (for example, cloud tenant information for ACME Corp.):

ION Connection Information for Cloud Account for ACME Corp:

- **ID: AKIBJIQ2ZFT34QZPABEF**
- **Security Key: vb0J7uXwPWT67bWohfROdQVmLftd/LrRS8HjNLMN**

IBOC Connection Information for Salesforce Org ID 00Bn0123456efgh:

- **IBOC Logical ID: lid://infor.sfdc.iboc_prd**
- **Tenant: ACMECORP01_PRD**
- **User Name: icboc-00Bn0123456efgh.sfdc**
- **Password: ibocpwd1234**
- **Endpoint URL: https://iboc01.inforcloudsuite.com/iboc_proxy/IonProxyGenService?wsdl**

See "Understanding ION Tenant Information" on page 42.

Enabling multiple currencies

Optionally, to enable multiple currencies (multi-currency) for your Salesforce organization, contact Salesforce support. See Salesforce documentation for information on multi-currency.

You must include this information in your request:

- Your Salesforce organization ID (production or sandbox). See "Retrieving your Salesforce.com organization ID" on page 19.
- The default currency for current and future records. For example, USD, EUR, GBP.

You must also confirm this information:

- You understand that multi-currency cannot be disabled after it has been enabled
- You are a system administrator who is authorized to request that multi-currency be enabled for your organization
- You give permission to Salesforce to lockout your organization for the time required to enable multi-currency, which will vary depending on your organization's data usage volume

Creating Infor Back Office Connect profiles

You must create these Infor Back Office Connect profiles:

- Infor Back Office Connect Administrator
- Infor Back Office Connect Developer
- Infor Back Office Connect User
- Infor Back Office Connect Read Only

To create these profiles, you clone the corresponding Salesforce profiles and map the associated permissions as part of the Infor Back Office Connect installation process. See "Object permission settings for Infor Back Office Connect user profiles" on page 269 for information on the recommended profile object permission configuration settings to assign to the Infor Back Office Connect user profiles.

Creating the Infor Back Office Connect Administrator profile

The Infor Back Office Connect Administrator profile is configured with the object and user interface permissions that are required to install, configure, manage, and troubleshoot Infor Back Office Connect. To create the Infor Back Office Connect administrator, you clone the Salesforce System Administrator profile.

To create the Infor Back Office Connect Administrator profile:

- 1 Log in to Salesforce as the system administrator.

- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Manage Users > Profiles** to display the User Profiles page.
- 4 In the Profile section, click **New** to display the Clone Profiles page.
- 5 Specify this information:
 - Existing Profile**
Select **System Administrator**. The user license is populated with Salesforce.
 - Profile Name**
Specify **Infor Back Office Connect Administrator** as the profile name.
- 6 Click **Save**. You do not have to modify the cloned profile. The profile will be updated by the Infor Back Office Connect installation.

Creating the Infor Back Office Connect Developer profile

The Infor Back Office Connect Developer profile is configured with the same permissions as the Infor Back Office Connect Administrator. The Infor Back Office Connect Developer profile is configured with the object and user interface permissions that are required to install, configure, manage, and troubleshoot Infor Back Office Connect.

To create the Infor Back Office Connect Developer profile:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Manage Users > Profiles** to display the User Profiles page.
- 4 In the Profile section, click **New** to display the Clone Profiles page.
- 5 Specify this information:
 - Existing Profile**
Select **System Administrator**. The user license is populated with Salesforce.
 - Profile Name**
Specify **Infor Back Office Connect Developer** as the profile name.
- 6 Click **Save**. You do not have to modify the cloned profile. The profile will be updated by the Infor Back Office Connect installation.

Creating the Infor Back Office Connect User profile

The Infor Back Office Connect User profile is configured with the permissions to manage account relationships, coordinate sales engagements, and report their progress to management. The Infor Back Office Connect User profile is configured with the object and user interface permissions to create and complete tasks, answer calls, quote prices, and sell products to customers. The Infor Back Office Connect User can also qualify contacts into leads. The Infor Back Office Connect User profile is also used by managers.

To create the Infor Back Office Connect User profile:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Manage Users > Profiles** to display the User Profiles page.
- 4 In the Profile section, click **New** to display the Clone Profiles page.
- 5 Specify this information:

Existing Profile

Select **Standard User**. The user license is populated with Salesforce.

Profile Name

Specify **Infor Back Office Connect User** as the profile name.

- 6 Click **Save**. You do not have to modify the cloned profile. The profile will be updated by the Infor Back Office Connect installation.

Creating an Infor Back Office Connect Read Only profile

An Infor Back Office Connect Read Only user does not have permissions to create, update, or delete records or information from Infor Back Office Connect. These steps are for manually configuring Infor Back Office Connect profiles. Infor Back Office Connect profiles are configured as part of the installation process.

Note: After installing Infor Back Office Connect, you must configure page layouts for the Infor Back Office Connect Read Only profile. See "Creating and modifying page layouts for an Infor Back Office Connect read only user (optional)" on page 62 and "Installing Infor Back Office Connect" on page 29.

Note: If a warning message displays during this process, click **OK**.

To create an Infor Back Office Connect Read Only profile:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **Manage Users > Profiles**.
- 5 Click **New**.
- 6 In the **Existing Profile** field, specify **Infor Back Office Connect User**. Use the Infor Back Office Connect User profile as the template to create the new Read Only profile.
- 7 In the **Profile Name** field, specify the name of the new profile. For example, name the new profile Infor Back Office Connect READ ONLY User.
- 8 Click **Save**.

Assigning Infor Back Office Connect profiles to users

After you create the Infor Back Office Connect profiles, assign the profiles to your Salesforce users based on the system privileges that they require.

To assign Infor Back Office Connect profiles to users:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Manage Users > Users** to display the All Users page.
- 4 Click **New User**.
- 5 Specify the information that you require. See additional details about these fields:

User License

Select **Salesforce**.

Profile

Select the **Infor Back Office Connect** profile to assign to the user.

- 6 Select the **Generate new password and notify user immediately** check box.
- 7 Click **Save**.

Creating required Infor Back Office Connect users

You must also create two required users: the integration user and the default record owner. Each of these users are assigned one of the Infor Back Office Connect profiles and have unique functions in the Infor Back Office Connect integration. See "Creating Infor Back Office Connect profiles" on page 21.

Note: The integration user and the default record owner can be existing Salesforce users, but the users must be assigned to the proper corresponding profile required for the user and be used consistently throughout the integration.

Creating the integration user

The integration user is assigned the Infor Back Office Connect Administrator profile and is used to start and stop the Infor Back Office Connect integration scheduler. The integration scheduler executes the scheduled processes that communicate with the host ERP system.

Note: The integration user cannot be a functional Salesforce user or the default record owner because record updates generated by the integration user do not initiate data transfers to the host ERP system.

To create the integration user:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.

- 3 In the sidebar column, select **Administration Setup > Manage Users > Users** to display the All Users page.
- 4 Click **New User**.
- 5 In the General Information section, specify information for these fields:
 - **Last Name**
 - **Alias**
 - **Email**
 - **Username**
 - **Nickname**
 - **Role**
 - **User License**
 - **Profile**
- 6 In the Mailing Address section, specify information for these fields:
 - Optionally, **Street**
 - Optionally, **City**
 - Optionally, **State/Province**
 - Optionally, **Zip/Postal Code**
 - Optionally, **Country**
- 7 In the Single Sign On Information section, specify information for these fields:
 - Optionally, **Federation ID**
- 8 In the Locale Settings section, specify information for these fields:
 - **Time Zone**
 - **Locale**
 - **Language**
 - **Currency**

Note: For new records created by the interface to display the correct time, set the Time Zone for the Integration user to GMT+00:00 Greenwich Mean Time.
- 9 In the Approver Settings section, specify information for these fields:
 - Optionally, **Delegated Approver**
 - Optionally, **Manager**
 - **Receive Approval Request Emails**
- 10 In the salesforce.com Newsletter Settings section, specify information for these fields:
 - Optionally, select the **Receive the salesforce.com newsletter** check box.
 - Optionally, select the **Receive the salesforce.com administrator newsletter** check box.
 - Optionally, select the **Generate new password and notify user immediately** check box.
- 11 Click **Save**.

Creating the default record owner

When sales-related objects publish records from ERP to Infor Back Office Connect, the default record owner is assigned as the interim owner of the record until an actual owner is assigned. The default record owner user must be assigned the Infor Back Office Connect User profile.

Note: Do not assign the default record owner user to a role in a role hierarchy.

After a record is published in Infor Back Office Connect, administrator, users, or the default record owner can reassign the ownership of the record to the existing Salesforce users.

To create the default record owner:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Manage Users > Users**.
- 4 Click **New User**.
- 5 In the General Information section, specify information for these fields:
 - **Last Name**
 - **Alias**
 - **Email**
 - **Username**
 - **Nickname**
 - Optionally, **Title**
 - Optionally, **Company**
 - Optionally, **Department**
 - Optionally, **Division**
 - **Role**
 - **User License**
 - **Profile**
- 6 In the Mailing Address section, specify information for these fields:
 - Optionally, **Street**
 - Optionally, **City**
 - Optionally, **State/Province**
 - Optionally, **Zip/Postal Code**
 - Optionally, **Country**
- 7 In the Single Sign On Information section, specify information for these fields:
 - Optionally, **Federation ID**
- 8 In the Locale Settings section, specify information for these fields:
 - **Time Zone**
 - **Locale**

- **Language**
- **Currency**

9 In the Approver Settings section, specify information for these fields:

- Optionally, **Delegated Approver**
- Optionally, **Manager**
- **Receive Approval Request Emails**

10 In the salesforce.com Newsletter Settings section, specify information for these fields:

- Optionally, select the **Receive the salesforce.com newsletter** check box.
- Optionally, select the **Receive the salesforce.com administrator newsletter** check box.
- Optionally, select the **Generate new password and notify user immediately** check box.

11 Click **Save**.

Enabling quotes

Salesforce Quotes must be enabled in the organization prior to installing the Infor Back Office Connect application due to legacy dependencies on the Quote object. As of Infor Back Office Connect 10.8.x, integrated ERP quotes are stored in the custom Infor Quote object.

To enable quotes:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Quotes > Settings**.
- 4 Select the **Enable Quotes** check box.
- 5 Click **Save**. The Page Layout Selection page is displayed.



Caution: Do not select the **Opportunity Layout** or the **Append to user's personal related list** check box.

6 Click **Save**.

Enabling social networks for accounts and contacts

Enable social networks for Accounts and Contacts if you have not already done so.

To enable social networks for Accounts and Contacts:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.

- 3 In the sidebar column, select **App Setup > Customize > Social Accounts and Contacts > Settings**.
- 4 Select the **Enable Social Accounts and Contacts** check box.
- 5 Click **Save**.

This chapter describes the tasks that you must complete to install Infor Back Office Connect on your Salesforce organization.

Installation tasks checklist

This checklist includes the list of tasks you must complete to install Infor Back Office Connect:

- Purchase the Infor Back Office Connect app from the Salesforce AppExchange
- Install the Infor Back Office Connect package on your Salesforce organization
- Confirm the Infor Back Office Connect installation in Salesforce

See the appropriate section of this guide for detailed instructions on how to complete these tasks.

Purchasing the Infor Back Office Connect app from the Salesforce AppExchange

The Infor Back Office Connect application is available for purchase on the Salesforce AppExchange (<http://appexchange.salesforce.com/>). After purchasing Infor Back Office Connect, your Infor account manager will send you a link to the Infor Back Office Connect package URL from which you can install the application in your Salesforce organization. For example, <https://login.salesforce.com/packaging/installPackage.apexp?p0=0000000000000000>.

Installing Infor Back Office Connect

After completing the pre-installation tasks and receiving the URL to the package installer, you can install Infor Back Office Connect on your Salesforce organization.

Note: The system administrator profile used during the installation should not be dependent upon any of the Infor Back Office Connect related profiles.

To install Infor Back Office Connect:

- 1 Log in to Salesforce as the system administrator.
- 2 Click the URL for the Infor Back Office Connect package installer provided by Infor to display the Package Installation Details page.
Note: If you are installing Infor Back Office Connect in a sandbox organization, you must change the beginning of the package URL to <http://test.salesforce.com>.
- 3 View the package installation details and click **Continue**. The Approve Third-Party Access window is displayed.
- 4 Select the **Yes, grant access to these third-party web sites** check box and click **Continue** to display the Step 1. Approve Package API Access page.
- 5 Review the extended object permissions and click **Next** to display the Step 2. Choose security level page.
- 6 Select the **Select security settings** option. The Customize security section is displayed.
- 7 In the Profile list, select the Infor Back Office Connect Administrator profile.
- 8 In the Access Level list for the Infor Back Office Connect Administrator profile, select **Infor Back Office Connect Administrator**.
- 9 In the Profile list, select the Infor Back Office Connect Developer profile.
- 10 In the Access Level list for the Infor Back Office Connect Developer profile, select **Infor Back Office Connect Developer**.
- 11 In the Profile list, select the Infor Back Office Connect User profile.
- 12 In the Access Level list for the Infor Back Office Connect User profile, select **Infor Back Office Connect User**.
- 13 In the Profile list, select the Infor Back Office Connect READ ONLY profile.
- 14 In the Access Level list for the Infor Back Office Connect READ ONLY profile, select **Infor Back Office Connect READ ONLY User**.
- 15 Click **Next** to display the Step 3. Install Package page.
- 16 Click **Install**. The package installation begins and a confirmation is displayed. After the package is installed successfully, Salesforce sends an e-mail notification to the e-mail address configured in the Salesforce user profile of the installer.
- 17 After you receive the e-mail notification indicating the Infor Back Office Connect package installation was successful, confirm the package installation on your Salesforce organization. See "Confirming the Infor Back Office Connect package installation" on page 30.

Confirming the Infor Back Office Connect package installation

After you receive the e-mail notification from Salesforce indicating that your request to install the Infor Back Office Connect package was successful, confirm the package installation on your Salesforce organization.

To confirm the Infor Back Office Connect package installation:

- 1 Log in to Salesforce as the system administrator.

- 2** Select **Setup**.
- 3** In the sidebar column, select **Installed Packages**.
- 4** In the Installed Packages sections, click the Infor Back Office Connect package name. The Package Details window is displayed.
- 5** In the **Version Name** field, verify that the correct version of Infor Back Office Connect is installed.

After installing the Infor Back Office Connect application on your Salesforce organization you must configure the application. This chapter provides detailed information on the post-installation tasks and procedures you must complete to configure Infor Back Office Connect.

Key configuration concepts

Before configuring the Infor Back Office Connect application for integration with ERP, there are several key concepts to understand and integration settings to consider based on the business needs of your integration. These key configuration settings are:

- The recommended inbound batch scope settings
- Price books
- Processing units of measure (unit groups or a standard unit group) for Item Master BODs
- Many to many configuration settings

The information in this section includes conceptual information on these concepts and settings to help you as you begin the configuration process.

After reviewing these configuration concepts, see "Post-installation tasks checklist" on page 39 to guide you through the Infor Back Office Connect configuration process.

Recommended Inbound Batch Scope values for initial data load

This table shows the recommended Inbound Batch Scope values for the initial data load of Infor Back Office Connect BOD documents:

BOD	Recommended Inbound Batch Scope Value
Code Definition	10
Contact Master	10
Customer Party Master	10

BOD	Recommended Inbound Batch Scope Value
Item Master	2
Transactions with 50 items or less	8
Transactions with 51 to 200 items	2

Note: Infor Back Office Connect supports Transaction BODs containing >1000 lines and supports a BOD Size of up to 2.5 MB. Any BOD larger than 2.5 MB will fail.

Understanding price books

Price books contain a list of products and their associated prices. In Salesforce, you can use the standard price book or create custom price books. The standard price book is generated automatically and contains a master list of all products and their standard prices. The combination of a product and its associated price is a price book entry.

When Infor Back Office Connect processes an ItemMaster BOD, price book entries are added to the standard price book by default. If you want to add products to custom price books, you can select one or more price books when configuring your BOD message source settings. If you select one or more custom price books, products are added to the standard and each of the selected price books. Price book entries are also added to all currencies created for your Salesforce organizations. These example scenarios describe this functionality:

Scenario 1: A Salesforce organization is configured with USD, CAD, and GBP custom price books and no price book is selected for the message source. When the ItemMaster BOD is processed, the price book item is added to the standard price book for USD, CAD, and GBP. A total of three price book items are added.

Scenario 2: A Salesforce organization is configured with USD, CAD, and GBP custom price books and the preferred price list is selected for the message source. When the ItemMaster BOD is processed, the price book item is added to the standard and preferred price lists. A total of six price book items are added.

Understanding unit group processing in Infor Back Office Connect

As Item Master BODs are synchronized, units of measure and unit groups are created or updated in Infor Back Office Connect for each item master. By default, unit groups functionality is enabled.

There are two possible unit group processing scenarios in Infor Back Office Connect:

- **Unit Groups enabled (default):** A unit group with a set of units of measure is created for each Item Master BOD, and each unit group contains each unit of measure only once.
- **Standard Unit Group enabled:** If the use of a Standard unit group is required for your integration scenario, you can also configure Infor Back Office Connect to process units of measure using a Standard unit group. In this scenario, as Item Master BODs are processed, all units of measure are

added to the Standard unit group. To configure Infor Back Office Connect to use a Standard unit group, you must select the **Enable Standard Unit Group** configuration setting on the Integration Setup page. Some additional configuration steps are also required. See "Configuring Infor Back Office Connect settings" on page 45.

If you are installing Infor Back Office Connect as a clean install, the unit groups functionality will be enabled by default. If you are upgrading to the latest version of Infor Back Office Connect from a previous version, or if you want to enable the Standard unit group functionality, we recommend that you complete these additional configuration steps:

- Migrate all unit group data to the Standard unit group. See "Migrating units of measure from unit groups to a Standard unit group" on page 162.
- Make the **Unit Group** field non-required on your page layouts and the **Unit Group** field must be removed entirely from the Products page layout. See Salesforce documentation.

Note: If you configured Infor Back Office Connect to process units of measure using a Standard unit group and want to restore the default unit group processing functionality, you must complete these steps to migrate your units of measure from the Standard unit group to unit groups:

- Clear the **Enable Standard Unit Group** check box in the Infor Back Office Connect settings on the Integration Setup page.
- Republish all Item Master BODs

Example: Unit groups enabled

When unit groups are enabled, a unit group and unit is created for every base unit of measure (UOM) assigned to an item. For example, EA (Each) is a base UOM for ITEM01. As the Sync Item Master BOD is processed, the BOD includes item ITEM01, so a unit group called ITEM01 is created. Because EA is assigned as the UOM for ITEM01, EA is added to the ITEM01 unit group.

When the Sync Item Master BOD is processed again, the master data includes ITEM01 again, but it contains three records: ITEM01 with EA as its UOM, ITEM01 with BOX as its UOM, and ITEM02 with EA as its UOM. As a result, a new unit group for ITEM02 is created and the UOM EA is added to the unit group. For unit group ITEM01, the UOM BOX is added to the unit group, but EA is not duplicated in the unit group because it already exists.

After processing, the resulting unit groups are:

	Item	UOM
Unit group: ITEM01	ITEM01	EA
	ITEM01	BOX
	Item	UOM
Unit group: ITEM02	ITEM02	EA

Example: Standard unit group enabled

When standard groups are enabled, all units of measure are added to the Standard unit group. When the Sync Item Master BOD is processed, the master data includes these items:

- ITEM01 with EA as its UOM
- ITEM01 with BOX as its UOM
- ITEM02 with BOX as its UOM
- ITEM03 with PALLET as its UOM
- ITEM04 with EA as its UOM
- ITEM05 with EA as its UOM

ITEM01, ITEM03, and ITEM04 are all assigned EA as their UOM. Another ITEM01 and ITEM02 are assigned BOX as UOMs. Though shared by multiple items, the EA and BOX UOMs are only inserted into the Standard unit group only once. They are not duplicated for the each item sharing the UOM.

After processing, the resulting unit groups are:

	UOM	Item(s)
Standard unit group	EA	ITEM01, ITEM04, ITEM05
	BOX	ITEM01, ITEM02
	PALLET	ITEM03

Understanding many-to-many configuration settings

The sections describes the many-to-many configuration settings available in Infor Back Office Connect.

Understanding account-to-contact relationships

Infor Back Office Connect supports two types of relationships between Customers (Accounts) and Contacts:

- 1** In a one-to-many relationship, an account can have one or more contacts. To support this one-to-many relationship:
 - Contacts are specified in the Contact related list of the Account page
 - Contacts can also be specified by the Account field on the Contact page
 - The Contact related list represents the list of employees for a given Account
- 2** In a many-to-many relationship, an account can have one or more contact roles. To support this many-to-many relationship:
 - Contact roles are specified in the Contact Role related list of the Account page
 - Contact roles can also be specified by the Account related list of the Contact page

- Contact roles allow consultant type contacts to be associated with multiple accounts

To configure the type of account-to-contact relationship mirroring for your in Infor Back Office Connect implementation, check or clear the **Mirror Account Contact Role** check box in Step 4: Configure Infor Back Office Connect Settings section of the Integration Setup page. See "Configuring Infor Back Office Connect settings" on page 45.

Note: Related lists that are not supported by an ERP should be removed from both the Account and Contact page layouts as part of a standard Infor Back Office Connect implementation and configuration. Contact Roles that are automatically created by the **Mirror Contact Role** option are created as a Business User.

Understanding the account relationship to each Party Master

This section describes the account relationships of CustomerPartyMaster many-to-many relationships with Ship-to, Bill-to, and Pay-from records.

Note: ERP-LN provides support for a Ship-to record to be attached to more than one Customer; but only if the two customers are related by a Parent Account relationship. ERP-A+ provides support for a Bill-to record to be shared across multiple related customers.

Many to Many support for the Ship-to, Bill-to and Pay-from records is provided by the Message Source based configuration options. You must select the check box for each of these options in Step 4: Configure Infor Back Office Connect Settings section of the Integration Setup page as they are not selected by default (see "Configuring Infor Back Office Connect settings" on page 45):

- Account Ship-to Many to Many Enabled
- Account Bill-to Many to Many Enabled
- Ship-to Bill-to Many to Many Enabled
- Bill-to Pay-from Many to Many Enabled

When enabled, the Master Detail Many to Many relationships is based on the junction object supporting the corresponding Ship-to, Bill-to or Pay-from Many to Many Related List.

When disabled, the corresponding Master Detail relationships are based on the One to Many relationship supported by the Ship-to Account, Bill-to Account, Bill-to Ship-to and Pay-from Bill-to lookup fields.

Understanding the many-to-many ship-to configuration

This section describes the many-to-many Account Ship-to relationship.

When the **Account Ship-to Many to Many Enabled** configuration is selected:

- The Account Ship-to many-to-many relationship is supported by the Account Ship-to junction object.
- Inbound BODs may contain multiple CustomerPartyIDs.
- Additions and deletions of Account Ship-to junction records result in ProcessShipToPartyMaster BODs.
- The ProcessShipToPartyMaster BOD CustomerPartyID Array is based on the Account Ship-to many-to-many junction records for the given Ship-to Master.

When the **Account Ship-to Many to Many Enabled** configuration is not selected:

- The Account Ship-to one-to-many relationship is supported by the Ship-to Account Lookup field.
- Inbound SyncShipToPartyMaster BODs may not contain more than one CustomerPartyID.
Note: If BODs contain more than one CustomerPartyID a Confirm BOD error message is displayed. To correct the error, you must configure Infore to support common Ship-to master data across multiple customers by enabling the **Ship-to Many to Many Enabled** configuration setting.
- The ProcessShipToPartyMaster BOD CustomerPartyID Array is based on the value of the Ship-to Account Lookup field.

Understanding the many to many bill-to configuration

This section describes the Many to Many Account Bill-to and the Many to Many Ship-to Bill-to relationships.

When the Account Bill-to Many to Many Enabled configuration is selected:

- The Account Bill-to Many to Many relationship is supported by the Account Bill-to junction object.
- Inbound BODs may contain multiple CustomerPartyIDs.
- Additions and deletions of Account Bill-to junction records result in ProcessBillToPartyMaster BODs.
- The ProcessBillToPartyMaster BOD CustomerPartyID Array is based on the Account Bill-to Many to Many junction records for the given Bill-to Master.

When the Account Bill-to Many to Many Enabled configuration is not selected:

- The Account Bill-to One to Many relationship is supported by the Bill-to Account Lookup field.
- Inbound SyncBillToPartyMaster BODs may not contain more than one CustomerPartyID.
Note: BODs containing more than one CustomerPartyID will cause this Confirm BOD error message to display: Bill-to Many to Many in Infor Back Office Connect must be enabled to support common Bill-to master data across multiple customers.
- The ProcessBillToPartyMaster BOD CustomerPartyID Array is based on the value of the Bill-to Account Lookup field.

When the Ship-to Bill-to Many to Many Enabled configuration is selected:

- The Ship-to Bill-to Many to Many relationship is supported by the Ship-to Bill-to junction object.
- Inbound BODs may contain multiple ShipToPartyIDs.
- Additions and deletions of Ship-to Bill-to junction records result in ProcessBillToPartyMaster BODs.
- The ProcessBillToPartyMaster BOD ShipToPartyID Array is based on the Ship-to Bill-to Many-to-Many junction records.

When the Ship-to Bill-to Many to Many Enabled configuration is not selected:

- The Ship-to Bill-to One to Many relationship is supported by the Bill-to Ship-to Lookup field.
- Inbound SyncBillToPartyMaster BODs may not contain more than one ShipToPartyID.

Note: BODs containing more than one ShipToPartyID will cause this Confirm BOD error message to display: Ship-to Bill-to Many to Many in Infor Back Office Connect must be enabled to support common Bill-to master data across multiple Ship-to Addresses.

- The ProcessBillToPartyMaster BOD ShipToPartyID Array is based on the value of the Bill-to Ship-to Lookup field.

Understanding the many to many pay-from configuration

This section describes the Many to Many Bill-to Pay-from relationship.

When the Many to Many Bill-to Pay-from Enabled configuration is selected:

- The Bill-to Pay-from Many to Many relationship is supported by the Bill-to Pay-from junction object.
- Inbound BODs may contain multiple BillToPartyIDs.
- Additions and deletions of Bill-to Pay-from junction records result in ProcessPayFromPartyMaster BODs.
- The ProcessPayFromPartyMaster BOD BillToPartyID Array is based on the Bill-to Pay-from Many-to-Many junction records for the given Pay-from Master.

When the Many to Many Bill-to Pay-from Enabled configuration is not selected:

- The Bill-to Pay-from One-to-Many relationship is supported by the Pay-from Bill-to Lookup field.
- Inbound SyncPayFromPartyMaster BODs may not contain more than one BillToPartyID.

Note: BODs containing more than one BilltoPartyID will cause this Confirm BOD error message to display: Bill-to Pay-from Many-to-Many in Infor Back Office Connect must be enabled to support common Pay-from master data across multiple Bill-to.

- The Process PayFromPartyMaster BOD BilltoPartyID Array is based on the value of the Pay-from Bill-to Lookup field.

Post-installation tasks checklist

This checklist includes the list of post-installation tasks you must complete to continue with the Infor Back Office Connect configuration and administration process. See the appropriate section of this guide for detailed instructions on how to complete these tasks.

After installing the latest Infor Back Office Connect upgrade package on your Salesforce organization, complete each of these post-upgrade tasks:

- Review the version-specific upgrade instructions in the *Infor Back Office Connect Release Notes*
Note: The post-upgrade tasks defined in the *Infor Back Office Connect Release Notes* supersede the instructions provided in this document.
- Enable feed tracking for sync failure notifications
- Configure the Infor Back Office Connect application integration with ERP

- Publish code definitions from ERP
- Optionally, configure multiple currencies based on your business requirements
- Enable history tracking for standard Salesforce objects
- Perform initial data load
- Configure reports
- Creating and modifying page layouts for an Infor Back Office Connect read only user (optional)

Enabling feed tracking for sync failure notifications

Infor Back Office Connect includes a feature that will post Salesforce Chatter notifications to failed records when BOD sync failures occur for custom objects. You must enable feed tracking for the custom objects to generate these notifications.

To enable feed tracking for sync failure notifications:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Customize > Chatter > Feed Tracking**.
- 5 In the Object section, select the Bill-to object. The fields in the bill-to records are displayed.
- 6 Select the **Enable feed tracking** check box and click **Save**. A confirmation message is displayed.
- 7 In the Object section, select the Pay-from object. The fields in the pay-from records are displayed.
- 8 Select the **Enable feed tracking** check box and click **Save**. A confirmation message is displayed.
- 9 In the Object section, select the Ship-to object. The fields in the ship-to records are displayed.
- 10 Select the **Enable feed tracking** check box and click **Save**. A confirmation message is displayed.
- 11 In the Object section, select the Territory object. The fields in the territory records are displayed.
- 12 Select the **Enable feed tracking** check box and click **Save**. A confirmation message is displayed.
- 13 In the Object section, select the Infor Quote object. The fields in the Infor quote records are displayed.
- 14 Select the **Enable feed tracking** check box and click **Save**. A confirmation message is displayed.
- 15 In the Object section, select the Infor Back Office Connect Order object. The fields in the Infor Back Office Connect order object records are displayed.
- 16 Select the **Enable feed tracking** check box and click **Save**. A confirmation message is displayed.

Configuring the Infor Back Office Connect application for ERP integration

Infor Back Office Connect includes default configuration settings that are required for integration with ERP. Because some settings are specific to your customer environment, the default configuration settings must be configured prior to the ERP integration.

The **Integration Setup** tab is divided into sections that guide you through the configuration process sequentially with a series of configuration tasks. The tasks include:

- Loading seed data
- Configuring the ION Connect connection points in ION Desk
- Configuring BOD message source settings
- Configuring Infor Back Office Connect settings
- Configuring Infor Back Office Connect adapter and scheduler settings
- Configuring Infor quote and opportunity settings
- Starting the scheduler
- Verify whether the scheduler started

To configure the Infor Back Office Connect application for ERP integration:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Integration Setup** tab.
- 4 Click the heading of the section of the tab related to the configuration task you must complete. Complete each of the steps in the order in which they are presented on the tab. For example, click [Step 1: Load Seed Data](#). After loading the seed data, click [Step 2: Configure ION Connection Point/Document Flow](#).

Loading seed data

To load seed data:

- 1 On the **Integration Setup** tab, click [Step 1: Load Seed Data](#).
- 2 Click **Load Seed Data**. The status of the data loading process is displayed until the load process is complete.
Note: The **Load Seed Data** button does not automatically display on certain browsers. If you do not see the button, click in the grey area of the page. The page will refresh and the button will be displayed.
- 3 Click the **Integration Setup** tab to refresh the settings.
- 4 Continue to the next step of the configuration process. See "Configuring the ION Connect connection points" .

Configuring the ION Connect connection points

After loading the seed data, you must configure the ION Connect middleware for the Infor Back Office Connect integration with ERP.

To complete this part of the Infor Back Office Connect configuration process, Infor ION Suite 10.3 or later is required, and you must have an Infor ION Desk login. When you receive your Infor ION Desk

login information, you will also receive a URL where you can log into ION Desk . For example, <http://usalvicmbw0k00.pmm.com:0000/IONDesk/ShellPage.aspx>.

Understanding ION Tenant Information

During the pre-installation process, you requested Infor ION tenant and an ION proxy tenant for your Salesforce organization. See "Getting Infor Back office Connect logical ID and ION tenant information from Infor" on page 20. Your ION tenant includes the connection point information required to configure Infor Back Office Connect to communicate with the ION proxy server. The ION proxy server houses the proxy container in ION to which messages are published and the proxy server that interacts with the Salesforce adapter that manages the sending and receiving of messages to and from ERP.

After Infor ION support sets up your ION tenants, you will receive an e-mail containing your ION tenant information. This information will be used during several of the post-installation configuration tasks. This table shows the ION service and Infor tenant information for the Salesforce organization ID 000000000000OcfO:

Infor Cloud tenant details for Infor Back Office Connect Application

This table shows the details of the ION Connection details: ACMECORP_PRD

Field	Value
ID	AKIBJIQ2ZFT34QZPABEF
Security Key	vb0J7uXw- PWT67bWohfROdQVmLftd/LrRS8HjNLMN

This table shows the Infor Back Office Connect details:

Field	Value
Endpoint URL	https://iboc01.inforcloudsuite.com/iboc_proxy/Ion-ProxyGenService?wsdl
IBOC Logical ID	lid://infor.sfdc.iboc_prd
Tenant	ACMECORP01_PRD
User Name	icboc-00Bn0123456efgh.sfdc
Password	ibocpwd1234

Creating a new Cloud Account

- 1 In Infor ION Desk, select **Connect (the paper clip icon) > Model > Cloud Accounts > Insert (the new document icon)**.
- 2 Click **Cancel** to dismiss the pop-up window titled Provide Infor Cloud Credentials.
- 3 Specify the **Cloud Account ID** and **Security Key** field sent in the Tenant details and click **Load**.
If the ERP uses any tenant other than "Infor", select the check box next to Tenant and enter the tenant name used by ERP , see example. You must check with your ERP administrator the details of the Tenant is used or verify the **Tenant** field in the ERP Connection Point in ION. The default

value used by most customers is “Infor” (blanks indicates the default value of “Infor”) but different values can be used.

Note: Do not specify the tenant that you received from Infor support (for example, ACMECORP01_PRD) in the tenant field.

- 4 Click **Save**.

Downloading the sample integration document flow

Infor has created a file (InforBackOfficeConnect_DocumentFlow.xml) that includes a sample ION document flow and connection points for the Infor Back Office Connect integration with ION. Download the ION document flow from the Infor Back Office Connect application to upload into ION Desk.

To download the Infor Back Office Connect document flow:

- 1 On the **Integration Setup** tab, click Step 2: Configure ION Connection Point/Document Flow.
- 2 Right-click the InforBackOfficeConnect_DocumentFlow.xml and save the document to a local drive.

Importing the sample integration document into Infor ION Desk

To import the sample integration file into ION Desk :

- 1 Sign in to Infor ION Desk.
- 2 Select **Model > Connect > Document Flow**.
- 3 Click **Import** and locate the InforBackOfficeConnect_DocumentFlow.xml file.
- 4 Click **Open**. The document is imported and a confirmation message is displayed.
- 5 Click **OK**.

Creating an Associate Cloud Account with the iboc-cloud connection point

- 1 Select **Model > Connect > Connection Points**. Select the new Connection Point (called iboc-cloud) in the **Connection Points** list and click **Details**. However, you can modify the name of the Connection Point.
- 2 Select **Cloud Account** and specify the cloud account created in previous steps. In the drop-down list for the cloud application, select the value that is displayed.
- 3 Click **Save**.
- 4 Click **Test**. The Test must succeed. If there are any issues, review the settings against the received Tenant registration details.
The Test must succeed. If there are any issues, review the settings in comparison with the received Tenant registration details.

Configuring the application task activity nodes

By default, the Infor Back Office Connect application has three activity nodes: Activity1, Activity2, and Activity3.

To configure the application task activity nodes:

- 1 In Infor ION Desk, select **Model > Connect > Document Flows**.
- 2 In the Flow Name list, double-click the Infor Back Office Connect document flow file. The Document Flow Modeler page is displayed.
- 3 Click on the Activity1 node in the flow modeler.
- 4 In the Application Task section, click **Add**. The Add Application window is displayed.
- 5 Select the iboc-cloud connection point name.
- 6 Click **OK**.
- 7 Repeat these steps for the Activity2 and Activity3 nodes.

Adding supported documents to the ION integration document flow

After configuring the connection points for the activity nodes, add the documents supported by the ERP to the ION integration document flow.

To add supported documents to the ION integration document flow:

- 1 In Infor ION Desk, select **Model > Connect > Document Flows**.
- 2 In the Flow Name list, double-click the Infor Back Office Connect document flow file. The Document Flow Modeler page is displayed.
- 3 Click the document icon between the Activity2 and Activity3 nodes.
- 4 In the Documents section, click **Add**. The Add Documents window is displayed.
- 5 Select the document(s) to add and click **OK**. The document is added and updates the Documents list.

Activating the Infor Back Office Connect document flow

After configuring the application connection point, activate the Infor Back Office Connect document flow.

To active the Infor Back Office Connect document flow:

- 1 In Infor ION Desk, select **Model > Connect > Document Flows**.
- 2 In the Flow Name list, select the document flow to activate.
- 3 Click **Activate**. A confirmation message is displayed.
- 4 Sign out of Infor ION Desk.
- 5 Continue to the next step of the configuration process. See "Configuring message source settings" on page 44.

Configuring message source settings

The message source settings specify the Message Source, Default Accounting ID, and ION Logical ID that are used to configure ERP to publish BOD documents to ION. Message source settings are customer-specific based on the ERP system being connected with ION and Infor Back Office Connect.

Based on your business requirements, you can also configure multiple message sources and associate the message sources with different entities, such as Account, Ship To, Confirm BOD. See "Configuring message source settings for multiple back office integration" on page 144.

To configure message source settings:

- 1 Login to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com App menu, select Infor Back Office Connect Administration.
- 3 Click the **Integration Setup** tab.
- 4 Click [Step 3: Configure Message Source Settings](#).
- 5 Click **New Message Source** to display the Message Source Edit window.
- 6 Specify this information:

Message Source Name

The default value is Message Source. To modify the value, specify the ERP that is your system of record. The message source is the application you are integrating with Infor Back Office Connect through ION. For example, ERP LN.

Logical ID

The default value is lid://infor.erp.instanceid. Modify this value to match the value that is set up in the ERP. This should be the "From LogicalID" in the BODs published by the ERP.

URL (optional)

The URL of the message source.

Default Accounting Entity ID

The default value is Default. To modify the value, specify the accounting entity ID from your ERP. For example, if you are integrating with ERP LN, the value specified corresponds with the Company Number in ERP LN. This value is required.

Default Location ID

Specify the default location for the ERP with which you are integrating. Default Location ID is used when the ERP is configured with multiple sites. This value is optional.

- 7 In the Entities Selection list, select the BOD noun(s) you want to be published to the message source you selected and click >> to add the noun(s).

Note: Press Ctrl + Click to select multiple nouns.

- 8 Click **Save**.
- 9 Continue to the next step of the configuration process. See "Configuring Infor Back Office Connect settings" on page 45.

Configuring Infor Back Office Connect settings

The Infor Back Office Connect settings define the Infor Back Office Connect connection with your ION tenant, which enables Infor Back Office Connect to communicate with the ION proxy server and the ION proxy container to which messages are published.

To configure Infor Back Office Connect settings:

1 On the **Integration Setup** tab, click [Step 4: Configure Infor Back Office Connect](#)[Infor Back Office Connect Settings](#).

2 Specify this information:

Component ID

The default value is `sfdc`. If the value is not already populated, specify **sfdc**. The value must be entered in lower-case letters.

Acknowledgment Message Timeout (In Minutes)

The default value is 5. To modify the value, specify the time interval in minutes that the application is to wait to receive the BOD acknowledgement message when it receives the Sync BOD for a given process prior to the BOD acknowledgement. If a BOD acknowledgement is not received within the specified interval, Infor Back Office Connect processes the Sync BOD and adds duplicate records.

Logical ID

Specify the logical ID for the Infor Back Office Connect connection point in ION. For example, `lid://infor.sfdc.iboc_prd`. The value specified must be the same as the **Logical ID** in the **Infor Back Office Connect** section of the Infor Cloud tenant details for Infor Back Office Connect Application provided to you by Infor ION support. See "Understanding ION Tenant Information" on page 42 .

Message Expiration (In minutes)

Specify the length of time in minutes that inbound and outbound messages are stored in Infor Back Office Connect. If no value is specified, no inbound and outbound messages are deleted. We recommend setting this value to 30. If set to 30, successful messages older than 30 minutes are deleted.

Tenant

Specify the tenant for the Infor Back Office Connect application connection point on ION. The default value is `Infor`. The value specified must be the same as the **Tenant** in the Infor Back Office Connect section of the Infor Cloud tenant details for Infor Back Office Connect Application provided to you by Infor ION support. See "Understanding ION Tenant Information" on page 42 .

Message Retry Count

The default value is 10. To modify this value, specify the number of attempts Infor Back Office Connect should make to process BODs with dependency on other objects. For example, if an inbound BOD for a child entity is received in Infor Back Office Connect before receiving a BOD message for its parent, the child record is locked and processing is continued until the parent record is found. If the parent record is not found after the specified number of attempts, the processing of the child BOD record is cancelled, the **Was Processed** field is set to 9, and an outbound Confirm BOD is sent.

Note: You can see the processing status of inbound messages on the Inbound Messages tab. See "Viewing inbound messages in Infor Back Office Connect" on page 100 and "Working with outbound confirm BODs".

Integration Context User

Select the data source for inbound messages from the Owner Lookup. The value selected must be the user configured as the integration user. See "Creating the integration user" on page 24 .

Confirmation Code

The default value is `OnError`, and this value cannot be modified.

Default Record Owner

Select the Infor Back Office Connect user assigned to the default record owner role from the Owner Lookup. The selected user is the default record owner for all sales-related objects published from ERP. This value is used as an interim record owner until an actual owner is assigned. See "Creating the default record owner" on page 26 .

- 3 If you are integrating Infor Back Office Connect with ION, select the **Publish Outbound Message** check box to enable Infor Back Office Connect to publish outbound messages.

Note: If you are not integrating Infor Back Office Connect with ION, Infor Back Office Connect functions as a standalone application and should not publish outbound messages. If you are using Infor Back Office Connect as a stand alone application, clear the **Publish Outbound Message** check box to disable outbound message publishing.

- 4 By default, the **Mirror Account Contact Role** check box is selected. When the **Mirror Account Contact Role Contacts** check box is selected, contacts are associated with accounts using either a one-to-many or many-to-many relationship. The type of account-to-contact relationship (one-to-many or many-to-many) you use is determined by the relationships supported by your ERP system(s). If your ERP uses many-to-many account-contact relationships, Infor Back Office Connect will mirror that relationship. Likewise, if your ERP uses one-to-many account-contact relationships, Infor Back Office Connect will mirror that relationship. If you want to support both relationship types, clear the **Mirror Account Contact Role** checkbox and disable the **New Contact** button on the Contact Role related list on your Account page layout. See "Understanding account-to-contact relationships" on page 36.

- 5 The setting of the **Enable Standard Unit Group** checkbox determines how unit groups for units of measure are processed within Infor Back Office Connect. If the checkbox is selected, a unit group is created for each item master BOD that is processed. By default, the **Enable Standard Unit Group** checkbox is not selected and the unit groups functionality is disabled. When Standard unit group functionality is enabled by selecting this check box, item masters share a common Standard unit group and units of measure are not duplicated within this Standard unit group. See "Understanding unit group processing in Infor Back Office Connect" on page 34.

Note: If the **Enable Standard Unit Group** checkbox is not selected, you must make the **Unit Group** field non-required on your page layouts and the **Unit Group** field must be removed entirely from the Products page layout. See Salesforce documentation.

- 6 In the Many to Many Configuration section, select the check box for each of the many to many master data relationships you want to configure:
 - **Account Ship-to Many to Many Enabled**
 - **Account Bill-to Many to Many Enabled**
 - **Ship-to Bill-to Many to Many Enabled**
 - **Bill-to Pay-from Many to Many Enabled**

If you do not select the many-to-many configuration master data set, then the configuration for that data set will default to a one-to-many master data relationship. See "Understanding account-to-contact relationships" on page 36.

Note: If your current data contains a many to many relationship and you want to migrate to a one to many relationship, an error message is displayed that indicates the number of existing many to

many records in your existing data. To continue with the migration, you must choose whether to keep or remove the many to many relationships for the affected records.

- 7 Click **Save**.
- 8 Continue to the next step of the configuration process. See "Configuring the Infor Back Office Connect adapter and scheduler settings" on page 48.

Configuring the Infor Back Office Connect adapter and scheduler settings

The Infor Back Office Connect adapter and scheduler settings are used to establish the connections to ION for Salesforce and ERP. The scheduler settings define the rate at which the Infor Back Office Connect scheduler sends and receives messages to and from ION from Salesforce and Infor Back Office Connect. The adapter acts as a listener that sends and receive messages pushed through the ION proxy container and the ION proxy server to and from ERP.

The Infor Back Office Connect adapter and scheduler configuration process includes these tasks:

- Creating the remote site for the ION Proxy Server
- Configuring the Infor Back Office Connect adapter settings
- Configuring the Infor Back Office Connect scheduler settings
- Testing the adapter connection

Creating the remote site for the ION proxy server

To create the remote site for the ION proxy server:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **Administration Setup > Security Controls > Remote Site Settings**.
- 5 Click **New Remote Site**.
- 6 Specify this information:

Remote Site Name

Specify the name of the ION proxy server. For example, ION_XMPP_Server.

Remote Site URL

Specify the URL for the ION proxy server container, which is the endpoint URL, that you received from Infor. For example, <https://ionsfdc101.saas.infor.com>. See "Understanding ION Tenant Information" on page 42.

- 7 Clear the **Disable Protocol Security** check box.
- 8 Select the **Active** check box.
- 9 Click **Save**.

Configuring Infor Back Office Connect scheduler settings

The Infor Back Office Connect scheduler settings define the login credentials for the ERP system to sign into ION and enable ION to hear and receive messages between ION and ERP.

During the pre-installation tasks, you requested to receive Infor ION tenant and ION proxy tenant information from Infor. See "Getting Infor Back office Connect logical ID and ION tenant information from Infor" on page 20. Most of the parameter values required for the adapter settings are taken from the Infor ION tenant and ION proxy tenant information provided to you by Infor. See "Understanding ION Tenant Information" on page 42.

This table shows the Infor Back Office Connect adapter parameters and their recommended settings:

Name	Value
Enable Adapter	Specify True . This value is used to enable communication between Infor Back Office Connect and the ION proxy server.
ION Proxy Container Endpoint URL	Specify the URL of the Salesforce adapter web service endpoint. The value specified must be the same as the Endpoint URL in the Infor Back Office Connect section of the Infor Cloud tenant details for Infor Back Office Connect Application provided to you by Infor ION support. See "Creating the remote site for the ION proxy server" on page 48.
Username	Specify the user name of the Infor Cloud tenant. For example, icboc-00Bn0123456efgh.sfdc. The value specified must be the same as the Username in the Infor Back Office Connect section of the Infor Cloud tenant details for Infor Back Office Connect Application provided to you by Infor ION support.
Password	Specify the password of the Infor Back Office Connect ION Cloud tenant. For example, ibocpwd1234. The value specified must be the same as the Password in the Infor Back Office Connect section of the Infor Cloud tenant details for the Infor Back Office Connect Application provided by Infor ION support.
ION Proxy Tenant	Specify the Tenant of Infor Back Office Connect Cloud tenant. For example, ACMECORP01_PRD. The value specified must be the same as the Tenant in the Infor Back Office Connect section of the Infor Cloud tenant details for Infor Back Office Connect Application provided to you by Infor ION support.
Request Timeout	Specify the maximum amount of time in milliseconds that the Infor Back Office Connect scheduler will wait for a response after making a web service callout. The specified value must not be greater than 100000. We recommend that you specify 40000.
Response Size	Specify the size in megabytes of the response to be received from the ION Proxy Container. The specified value must not be greater than 1.5MB. We recommend that you specify 1.5MB.

Name	Value
Chunk Size	Specify the size in kilobytes of the BOD XML chunks to be processed by the adapter. The specified value should not be greater than 700KB. We recommend that you specify 700KB.

To configure the adapter settings:

- 1 On the **Integration Setup** tab, click [Step 5: Infor Back Office Connect Scheduler Settings](#).
- 2 In the Configure Infor Back Office Connect Scheduler Settings section, select the parameter to configure and click [Edit](#). The parameter **Name** and **Value** fields are displayed.
- 3 In the **Name** field, specify the appropriate field value for the selected parameter.
- 4 Click **Save**.
- 5 Repeat these steps for each of the scheduler settings.
- 6 Continue to the next step of the configuration process. See "Configuring the scheduler settings" on page 50

Configuring the scheduler settings

The scheduler settings define the rate at which web services push and pull scheduled jobs between Salesforce and ION.

This table shows the Infor Back Office Connect scheduler parameters and their recommended settings:

Name	Value
Job Frequency	Specify the frequency interval in seconds that the job scheduler runs. We recommend that you specify 15 seconds.
Total Batch Jobs	<p>Specify the total number of concurrent Batch Apex jobs supported by Salesforce. We recommend that you specify 5. The setting of this parameter determines how many concurrent InboundMessageBatch jobs are scheduled in Infor Back Office Connect.</p> <p>Note: Stop all custom batch jobs when performing the initial data load to improve performance.</p> <p>If Total Batch Jobs is set to 5, the number of batch jobs is calculated using this formula:</p> $\# \text{ of concurrent InboundMessageBatch jobs} = \text{Total Batch Jobs} - (\# \text{ of active custom batch jobs} + 1)$ <p>The (+1) in this equation is reserved for the OutboundMessageBatch.</p>
Inbound Batch Scope	<p>Specify the number of records that the InboundMessageBatch job passes to the execute method at one time. The default value is 5. We recommend that you specify 10. Increasing the value of this parameter speeds up inbound BOD performance.</p> <p>Note: Specifying a value greater than 10 may cause the Salesforce.com governor exceptions.</p>

Name	Value																										
Max. Outbound Delay Count	<p>The setting of this parameter determines how often to force the Outbound BOD processing polling job during heavy load times. The numerical value specified indicates an interval after which the regular processing cycle will force the processing of outbound BODs to publish any pending outbound BODs and delete any successful outbound BODs.</p> <p>Inbound BODs are given priority over outbound BODs during the regular BOD processing cycles. As a result, during heavy load times, the number of threads allocated for BOD processing in Salesforce may be exhausted by the inbound BOD traffic, thus causing the outbound BOD processing to stall. By setting a value for this parameter, the polling job for processing will force the outbound BOD processing job to resolve potential delays in outbound BOD processing.</p> <p>The default setting for this parameter is 3. The minimum value that can be specified is 1. There is no maximum value. For example, if you specify 2 as the setting for this parameter, after two regular BOD processing cycles, the third cycle will force the outbound processing. Thus, the forced cycle rotation is derived by adding 1 to the specified value.</p>																										
[BOD Noun] Priority	<p>The BOD noun priority parameters define the sorting order for inbound BOD processing that determines the order in which the documents are read and processed.</p> <p>Currently the BOD nouns are organized in increments of 100 (100, 200, 300, etc.), which specifies the order of the initial data load. These values maybe modified to support customer needs.</p> <p>The supported BOD nouns and their default priority settings are:</p> <table border="1" data-bbox="581 1192 1421 1845"> <tbody> <tr><td>CodeDefinition</td><td>100</td></tr> <tr><td>ItemMaster</td><td>200</td></tr> <tr><td>ContactMaster</td><td>300</td></tr> <tr><td>CustomerPartyMaster</td><td>400</td></tr> <tr><td>ShipToPartyMaster</td><td>500</td></tr> <tr><td>BilltoPartyMaster</td><td>600</td></tr> <tr><td>PayFromPartyMaster</td><td>700</td></tr> <tr><td>Quote</td><td>800</td></tr> <tr><td>SalesOrder</td><td>900</td></tr> <tr><td>Shipment</td><td>1000</td></tr> <tr><td>CustomerReturn</td><td>1100</td></tr> <tr><td>Invoice</td><td>1200</td></tr> <tr><td>ReceivableTransaction</td><td>1300</td></tr> </tbody> </table>	CodeDefinition	100	ItemMaster	200	ContactMaster	300	CustomerPartyMaster	400	ShipToPartyMaster	500	BilltoPartyMaster	600	PayFromPartyMaster	700	Quote	800	SalesOrder	900	Shipment	1000	CustomerReturn	1100	Invoice	1200	ReceivableTransaction	1300
CodeDefinition	100																										
ItemMaster	200																										
ContactMaster	300																										
CustomerPartyMaster	400																										
ShipToPartyMaster	500																										
BilltoPartyMaster	600																										
PayFromPartyMaster	700																										
Quote	800																										
SalesOrder	900																										
Shipment	1000																										
CustomerReturn	1100																										
Invoice	1200																										
ReceivableTransaction	1300																										

Name	Value
	<p>As BOD nouns are processed, the lowest value will be processed first (100) followed by the next highest (200, 300, etc.) until the processing is completed.</p> <p>To edit the value click the Edit hyperlink next to the BOD noun in the Field Name column, and then modify the Value field in the header of the Configure Scheduler Settings section. After modifying the value, click Save.</p> <p>For example, you can click <u>Edit</u> next to the ShipToPartyMaster Priority noun and modify the value from 500 by decreasing or increasing the number in increments of 100 to the new value to indicate its priority. For example, you could enter 300 to process the ShipToPartyMaster BOD earlier, or you could enter 700 to process the BOD later.</p>

To configure the scheduler settings:

- 1 On the **Integration Setup** tab, click [Step 5: Infor Back Office Connect Scheduler Settings](#).
- 2 In the Configure Scheduler Settings section, select the parameter to configure and click Edit. The parameter **Name** and **Value** fields are displayed.
- 3 In the **Name** field, specify the appropriate field value for the selected parameter.
- 4 Click **Save**.
- 5 Repeat these steps for each of the scheduler settings.
- 6 Continue to the next step of the configuration process. See "Testing the Infor Back Office Connect scheduler and scheduler connection" on page 52.

Testing the Infor Back Office Connect scheduler and scheduler connection

After configuring the Infor Back Office Connect scheduler and scheduler settings, test the connection to see if the configuration is successful.

To test the scheduler connection:

- 1 On the **Integration Setup** tab, click [Step 5: Infor Back Office Connect Scheduler Settings](#).
- 2 In the Configure Infor Back Office Connect Scheduler Settings section, click **Test Scheduler Connection**. A confirmation message is displayed. If the confirmation message indicates that the connection was unsuccessful, verify the scheduler configuration settings.

Configuring Infor quote and opportunity settings

Configure your Infor Quote and Opportunity settings in the [Step 6: Configure Quote and Opp Settings](#) section of the **Integration Setup** tab.

Infor Back Office Connect includes the Infor Quotes custom object, which replaces the standard Salesforce Quotes object.

The standard Salesforce Quotes object requires that all quotes are associated with a parent opportunity. See Salesforce documentation. Because many ERP systems do not use opportunities, inbound quotes

sent from your ERP to Infor Back Office Connect may not contain an opportunity reference depending on your ERP configuration.

To provide you with greater flexibility in your ERP and Salesforce integration, the Infor Quotes custom object is configured by default to create quote records without an opportunity. But, you also have the option to configure Infor Back Office Connect to create a system opportunity for all inbound quotes sent to Infor Back Office Connect from ERP.

The Infor Quote object also enables you to clone quote documents and email quote PDF documents directly from the Quote object to customers for their review. You may also configure your default settings for cloning quotes and your email template in the [Step 6: Quote and Opp Settings](#) section of the **Integration Setup** tab.

Configuring Infor Back Office Connect to create system opportunities

By default, the Infor Quotes custom object is configured to create quote records without an opportunity for inbound quotes received from ERP. You also have the option to configure Infor Back Office Connect to create a system opportunity for all inbound quotes from ERP. If you plan to use system opportunities for inbound ERP, we recommend that you define a Default Value to identify these system opportunities in your Integration Setup configuration settings. For example, if the Default Value is set to NEW DEAL, all system opportunities are assigned NEW DEAL as the opportunity Name.

Note: You also have the option to disable the system opportunities feature at any time.

To configure Infor Back Office Connect to create system opportunities:

- 1 On the **Integration Setup** tab, click [Step 6: Quote and Opp Settings](#).
- 2 Select the **Create System Opportunity** check box.

Note: To disable the system opportunities feature, clear the **Create System Opportunity** check box and click **Save**.

- 3 Click **Save**.
- 4 Continue to the next step of the configuration process. See "Setting the system opportunity default values" on page 53.

Setting the system opportunity default values

In Salesforce, opportunities and quotes have a parent-child relationship, so a quote cannot exist without an associated parent opportunity. See Salesforce documentation. Infor Back Office Connect includes the Infor Quotes custom object, which replaces the standard Salesforce Quotes object.

Because many ERP systems do not use opportunities, inbound quotes sent from ERP to Infor Back Office Connect do not contain an opportunity. When Infor Back Office Connect is installed, Infor Quotes custom object overrides the Salesforce system constraint requiring an opportunity on a quote, and by default Infor Back Office Connect is configured to create quote records without an opportunity.

However, you also have the option to configure Infor Back Office Connect to create a system opportunity for all inbound quotes sent to Infor Back Office Connect from ERP. When Infor Back Office Connect creates the system opportunity, the default record owner is assigned as the owner of the opportunity.

In the Configure System Opportunity Default Values section of the **Integration Setup** tab, you can specify default values for the fields used by Infor Back Office Connect to create system opportunities.

Note: You must set default values for all of the mandatory fields configured for the Opportunities object. Specifically, Name, Stage, Close Date.

To set the opportunity default values:

- 1 On the **Integration Setup** tab, click [Step 6: Quote and Opp Settings](#).
- 2 In the Configure System Opportunity Default Values section, select the field for which to set a default value from the **Name** list.

Note: If you do not define a default value for the opportunity Name, the system opportunity is automatically assigned the quote EXTID as the opportunity name.

- 3 In the **Default Value** field, specify the default value for the selected field.
- 4 Click **Save**.
- 5 Repeat steps 2 - 4 for Stage and Close Date to complete the configuration of all the mandatory fields and also for any other fields for which you would like to define default values.
- 6 Continue to the next step of the configuration process. See "Configuring the Infor quote cloning settings" on page 54.

Configuring the Infor quote cloning settings

Clone quote documents of any status to create a quote from an existing quote the Infor Quote object. Configure your default settings for cloning quotes and in the Step 6: Quote and Opp Settings section of the **Integration Setup** tab.

To configure Infor quote cloning settings:

- 1 On the **Integration Setup** tab, click [Step 6: Quote and Opp Settings](#).
- 2 In the Configure Quote Clone fields/related objects section, specify information in these fields:
 - In the **Object Name** list, select the quote-related object. You can select any of these objects: Attachment, Content, Content Document Link, Entity Subscription, Event, Feed Comment, Feed Item, Infor quote, Infor quote Line Item, Note, Opportunity, Quote Document, Share: Infor quote, or Task.
 - In the **Field Name** list, select the field on the selected object for which to specify a default value.
 - In the **Default Value** field, specify the default value to populate the selected field with whenever a quote is cloned.
 - Select the **Override?** check box if you want the default value to replace any data that may be in the field from the source quote. If the **Override?** check box is selected, Infor Back Office Connect will copy the value in the source field to the cloned record.
- 3 Click **Save**.
- 4 Repeat steps 2 and 3 for each object and field that requires default values.
- 5 Continue to the next step of the configuration process. See "Configuring quote PDF document settings" on page 55.

Configuring quote PDF document settings

The Infor Quote object includes a feature to create PDF documents to directly quote to customers for their review. By default, Infor Back Office Connect also includes an PDF quote document template (QuoteToPDFPage) that is used to generate PDF documents of Infor quotes.

To modify or customize a quote PDF template based on your business requirements, you must install Custom Quote PDF Reference package and then modify the custom PDF Visualforce page (QuoteToPDF1) to replace the default quote PDF template. See "Creating a customized quote PDF template" on page 165.

This part of the configuration process is optional. If you want to use the default quote PDF template and do not need to customize or modify a quote PDF document template, continue to the next step of the configuration process. See "Starting the scheduler".

Modifying page layouts for the many to many configuration (optional)

When the Many to Many Message Source based configuration options for the Ship-to, Bill-to and Pay-from records are enabled, these page layouts must be modified:

- Account page layout
- Bill-to page layout
- Pay-from page layout
- Ship-to page layout

Modifying the account page layout for many to many configurations

To modify the Account page layout for the Account Ship-to and Account Bill-to Many to Many Enabled configurations:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com App menu, select Infor Back Office Connect Administration.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Customize > Accounts > Page Layouts**.
- 5 In the Account Page Layouts section, click the **Edit** hyperlink for the Infor Back Office Connect Account Layout. See Salesforce documentation.
- 6 Remove the Ship-to Records related list.
- 7 Add the Ship-to Roles related list.
- 8 Click **Save**.
- 9 Repeat Steps 1 through 8 for the Account Bill-to Many to Many Enabled configuration for these related lists:
 - Add the Bill-to Roles related list.
 - Remove the Bill-to Records related list.

Modifying the bill-to page layout for many to many configurations

To modify the Bill-to page layout for the Account Bill-to, Ship-to Bill-to, and Bill-to Pay-from Many to Many Enabled configurations:

- 1** Log in to Infor Back Office Connect as the system administrator.
- 2** In the Force.com App menu, select Infor Back Office Connect Administration.
- 3** Select **Setup**.
- 4** In the sidebar column, select **App Setup > Create > Objects**.
- 5** In the Label column, click the Bill-to link.
- 6** In the Bill-to (Managed) window, select **Page Layouts**.
- 7** Click the **Edit** hyperlink for the Infor Back Office Connect Bill To Layout.
- 8** Remove the Account lookup field.
- 9** Add the Account related list.
- 10** Click **Save**.
- 11** Repeat Steps 1 through 10 for the Ship-to Bill-to Many to Many Enabled configuration for this related list and field:
 - Add the Ship-to Roles related list.
 - Remove the Ship-to lookup field.
- 12** Repeat Steps 1 through 10 for the Bill-to Pay-from Many to Many Enabled configuration for these related lists:
 - Add the Pay-from Roles related list.
 - Remove the Pay-from Records related list.

Modifying the pay-from page layout for many to many configurations

To modify the page layout for the Bill-to Pay-from Many to Many Enabled configuration:

- 1** Log in to Infor Back Office Connect as the system administrator.
- 2** In the Force.com App menu, select Infor Back Office Connect Administration.
- 3** Select **Setup**.
- 4** In the sidebar column, select **App Setup > Create > Objects**.
- 5** In the Label column, click the Pay-from link.
- 6** In the Pay-from (Managed) window, select **Page Layouts**.
- 7** Click the **Edit** hyperlink for the Infor Back Office Connect Pay From Layout.
- 8** Remove the Bill-to lookup field.
- 9** Add the Pay-from related list.
- 10** Click **Save**.

Modifying the ship-to page layout for many to many configurations

To modify the Ship-to page layout for the Account Ship-to and Ship-to Bill-to Many to Many Enabled configurations:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com App menu, select Infor Back Office Connect Administration.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Create > Objects**.
- 5 In the Label column, click the Ship-to link.
- 6 In the Ship-to (Managed) window, select **Page Layouts**.
- 7 Click the **Edit** hyperlink for the Infor Back Office Connect Ship-to Layout.
- 8 Remove the Account lookup field.
- 9 Add the Account related list.
- 10 Click **Save**.
- 11 Repeat Steps 1 through 10 for the Ship-to Many to Many Enabled configuration for these related lists:
 - Add the Bill-to Roles related list.
 - Remove the Bill-to Records related list.

Starting the scheduler

The scheduler is the Infor Back Office Connect component that sends messages. The messages trigger the processing of inbound and outbound Batch Apex jobs (by the adapter) to process inbound and outbound messages.

Note: The scheduler should be stopped any time the ION Document Flow is disabled to prevent false notifications from being sent to Infor Back Office Connect.

To start the scheduler:

- 1 Log in to Salesforce as the Integration context user.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Integration Setup** tab.
- 4 On the **Integration Setup** tab, click [Step 7: Start/Stop Scheduler](#).
- 5 Click **Start ION Integration Scheduler**. A confirmation message is displayed.
- 6 Continue to the next step of the configuration process. See "Verifying whether the scheduler is started" on page 57.

Verifying whether the scheduler is started

To verify whether the scheduler is started:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.

- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Monitoring > Scheduled Jobs**.
- 4 In the All Scheduled Jobs list, verify that the Job Name IONBatchExecutor is displayed. If the IONBatchExecutor job is displayed, the scheduler started correctly. If the IONBatchExecutor is not displayed, verify the Infor Back Office Connect configuration settings.

Configuring multiple currencies

Optionally, if your Salesforce organization uses multiple currencies for opportunities, quotes, and other objects that support multiple currency, you must create, activate, and configure all of your currencies before initiating BOD communication between ERP and Infor Back Office Connect. Every currency that you create must also have a corresponding price book. See Salesforce documentation for information on multi-currency.

Adding currencies

After you have enabled multiple currencies, add the currencies required for your Salesforce organization.

To add currencies:

- 1 Log in to Salesforce as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **Administration Setup > Company Profile > Manage Currencies**.
- 5 In the Active Currencies section, click **New**.
- 6 Specify this information:

Currency Type

Select the currency to define. The available currencies are displayed in alphabetical order according to the ISO currency code.

Conversion Rate

Specify the conversion rate to use when converting the corporate currency into this new currency.

Decimal Places

Specify the number of decimal places to use to the right of the decimal point when displaying this new currency. The value specified must be an integer between 0-6. By default, Infor Back Office Connect stores four decimal places to the right of the decimal for prices and two for amounts. The value specified for this setting will replace the default number of decimal places displayed for both prices and amounts.

- 7 Click **Save**.

Activating currencies

Activate additional currencies for your Salesforce organization that have already been defined but are currently inactive.

To activate currencies:

- 1 Log in to Salesforce as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **Administration Setup > Company Profile > Manage Currencies**.
- 5 Select the currency to activate from the Inactive Currencies list and click **Activate**.

Changing the default currency

If necessary, you can change the default currency to the corporate currency of your Salesforce organization to another supported currency. If you change the default currency, all of your current currency conversion rates are modified to reflect the change in default currency.

To change the default currency:

- 1 Log in to Salesforce as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **Administration Setup > Company Profile > Manage Currencies**.
- 5 In the Active Currencies section, click **Change Corporate**.
- 6 Select the currency to set as the default from the New Corporate Currency list.
- 7 Click **Save**.

Enabling history tracking for standard objects

By default, history tracking is enabled for these fields: **InForceEW_extid_c** (the ERP key value) and **InForceEW_extaccountingentityid_c** (Company ID) on all Infor Back Office Connect custom objects.

For standard Salesforce objects, history tracking is not enabled by default, and you must configure history tracking manually. See Salesforce documentation for information on history tracking and how to configure field history tracking.

Performing the initial data load

After completing the post-installation tasks, perform the initial data load from ERP into Infor Back Office Connect. See *Infor Back Office Connect BOD Mapping and Descriptions (Inbound)*. For specific data

load sequencing information for your ERP, see your ERP integration guide. Also, see "Recommended Inbound Batch Scope values for initial data load" on page 33 for each data set you are loading.

Note: To prevent duplicate Units of Measure from being created during the initial data load of the Item Master BOD, you must change the value of the **Total Batch Jobs** setting to 2. After performing the initial data load of the Item Master BOD, change the **Total Batch Jobs** setting back to 5 and continue loading the remaining data. See "Configuring the scheduler settings" on page 50.

This table shows the recommended initial data load sequence:

Data Set	ERP Objects	BOD
1	Geographic Area	Code Definition
1	Customer Types	Code Definition
1	Industries	Code Definition
1	Markets	Code Definition
1	NAICS	Code Definition
1	Payment Terms	Code Definition
1	Territories	Code Definition
2	Items	Item Master
4	Contact	Contact Party Master
5	Customer	Customer Party Master
6	Bill-to	Bill-to Party Master
7	Ship-to	Ship-to Party Master
8	Pay-from	Pay-from Party Master
9	Quotes	Quotes
10	Sales Orders	Sales Orders
11	Shipments	Shipments
12	Customer Returns	Customer Returns
13	Invoices	Invoices
14	Receivables	Receivables

Publishing code definitions from ERP

After configuring the Infor Back Office Connect application to synchronize with ERP, you must publish the required code definitions from ERP to Infor Back Office Connect. Code definition objects are only synchronized one way and are published only from ERP to Infor Back Office Connect. Any updates made to code definition objects in Infor Back Office Connect are not synchronized back to the ERP.

Code definitions and their values appear in Infor Back Office Connect as lookup categories and lookups. Lookups are used to search for records. In Salesforce you have standard and enhanced or custom lookups.

After the code definitions are published successfully, you can view them on the **Lookups** and **Lookup Categories** tabs.

Viewing code definition lookup categories

To view code definition lookup categories:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Lookup Categories** tab.
- 4 View the code definition lookup categories.

Viewing code definition lookups

To view code definition lookups:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Lookups** tab.
- 4 View the code definition lookups.

Configuring reports

By default, data associated with Infor Back Office Connect custom objects and tabs is available for reporting using the standard Salesforce reporting features. To configure Infor Back Office Connect reports, you can:

- Add Infor Back Office Connect custom fields to any existing regular reports
- Add Infor Back Office Connect custom fields to any existing custom reports you have created
- Add additional custom reports to report on ERP data. For example, you can add a report that compile data on all accounts with sales orders.

See Salesforce documentation for information on Salesforce reporting and creating reports.

Disabling reports for custom objects (optional)

You can disable reports for these custom objects:

- Inbound Message
- Lookup
- Lookup Category
- Outbound Message
- Outbound Transaction

Note: This is an optional step.

To disable reports for custom objects:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Create > Objects**.
- 5 In the Custom Objects list, select a custom object.
- 6 Click **Edit**.
- 7 In the Optional Features section, clear the **Allow Reports** checkbox.
- 8 Click **Save**.
- 9 Repeat Steps 5 through 8 for the remaining objects.

Creating and modifying page layouts for an Infor Back Office Connect read only user (optional)

When preparing for the Infor Back Office Connect installation process, you may optionally create an Infor Back Office Connect read only profile. See "Creating an Infor Back Office Connect Read Only profile" on page 23. After installing Infor Back Office Connect, you must configure the page layouts for the Infor Back Office Connect read only profile. This process includes creating an Infor Back Office Connect read only page layout for the Account, Contacts, Bill-to, Pay-from, and Ship-to objects, and removing new buttons on the related lists on these objects.

Creating an Infor Back Office Connect read only account page layout

An Infor Back Office Connect Read Only Account Page Layout must be assigned to Infor Back Office Connect Read Only profile users.

To create an Infor Back Office Connect Read Only Account Page Layout:

- 1 Log in to Infor Back Office Connect as the system administrator.

- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Customize > Accounts > Page Layouts**.
- 5 Click **New**.
- 6 In the **Existing Page Layout** field, specify the Infor Back Office Connect Account Layout option.
- 7 In the **Page Layout Name** field, specify the name of the new profile. For example, Infor Back Office Connect READ ONLY Account.
- 8 Click **Save**.

Note: Make note of the Related Lists in the Mini Page Layout window.

Note: Use standardized naming conventions for your custom objects to ensure that they are easily identifiable by the Infor Back Office Connect Administrator or Implementer.

Removing new buttons from account-related lists on the read only account page layout

When the Infor Back Office Connect Read Only Account Page Layout is created, new buttons associated with Related Lists display on the page. These new buttons must be removed.

To remove a new button from an account-related list:

- 1 In the Infor Back Office Connect Read Only Account page, go to the Addresses section.
 - 2 Click the **Wrench icon**.
 - 3 In the Related Lists Properties - Addresses window, click Buttons Plus (+).
 - 4 In the Selected Buttons section, select **New Address**.
 - 5 Click **Remove**. The **New Address** button is moved to the Available Buttons section.
- Note:** You can also clear the standard button check box to remove the button from the related list.
- 6 Click **OK**.
 - 7 Repeat Steps 1 through 6 for these related lists:

Related List Properties - Contacts

Clear the New check box.

Related List Properties - Contact Roles

Remove New Contact Role.

Related List Properties - Ship-to Records

Clear the New check box.

Related List Properties - Bill-to Records

Clear the New check box.

Related List Properties - Opportunities

Clear the New check box.

Related List Properties - Cases

Clear the New check box.

- 8 Click **Save**.
- 9 In the Account Page Layout page, select **Page Layout Assignment**.
- 10 Click **Edit Assignment**.
- 11 In the Profiles column, select the Infor Back Office Connect **READ ONLY User** profile.
- 12 In the **Page Layout to Use** field, specify the Infor Back Office Connect **Read Only Account** page layout option.
- 13 Click **Save**.

Creating an Infor Back Office Connect read only contact page layout

An Infor Back Office Connect Read Only Contact Page Layout must be assigned to Infor Back Office Connect Read Only Profile users.

To create an Infor Back Office Connect Read Only Contact Page Layout:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Customize > Contacts > Page Layouts**.
- 5 Click **New**.
- 6 In the **Existing Page Layout** field, select the Infor Back Office Connect Contact Layout or specify a contact layout profile you want to use as your template.
- 7 In the **Page Layout Name** field, specify the name of the new read only page layout. For example, Infor Back Office Connect READ ONLY Contact.
- 8 Click **Save**.

Note: Make note of the Related Lists in the Mini Page Layout window.

Note: Use standardized naming conventions for your custom objects to ensure that they are easily identifiable by the Infor Back Office Connect Administrator or Implementer.

Removing new buttons from contact-related lists on the read only contact page layout

When the Infor Back Office Connect Read Only Contact Page Layout is created, new buttons associated with Related Lists display on the page. These new buttons must be removed.

To remove a new button from the contact-related list:

- 1 In the Infor Back Office Connect Read Only Contact page, go to the Accounts section.

- 2 Click the **Wrench** icon.
- 3 In the Related Lists Properties - Accounts window, click Buttons Plus (+).
- 4 In the Selected Buttons section, select **New Account**.
- 5 Click **Remove**. The **New Account** button is moved to the Available Buttons section.
Note: You can also clear the standard button check box to remove the button from the related list.
- 6 Click **OK**.
- 7 Repeat Steps 1 through 6 for these related lists:
 - Related List Properties - Addresses**
Remove New Address.
 - Related List Properties - Pay-from Roles**
Remove New Pay-from Role.
 - Related List Properties - Social Media**
Remove New Social Media.
 - Related List Properties - Ship-to Roles**
Remove New Ship-to Role.
 - Related List Properties - Messengers**
Clear the New checkbox.
 - Related List Properties - Bill-to Roles**
Remove New Bill-to Role.
- 8 Click **Save**.
- 9 In the Contact Page Layout page, select **Page Layout Assignment**.
- 10 Click **Edit Assignment**.
- 11 In the Profiles column, select the Infor Back Office Connect **Read Only** profile.
- 12 In the **Page Layout to Use** field, specify the Infor Back Office Connect **READ ONLY Contact** page layout option.
- 13 Click **Save**.

Creating an Infor Back Office Connect read only bill-to page layout

An Infor Back Office Connect Read Only Bill-to Page Layout must be assigned to Infor Back Office Connect Read Only profile users.

To create an Infor Back Office Connect Read Only Bill-to Page Layout:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Create > Objects**.
- 5 In the Label column, click the **Bill-to** link.

- 6 In the Bill-to (Managed) window, go to the **Page Layouts** section.
- 7 Click **New**.
- 8 In the **Existing Page Layout** field, specify Infor Back Office Connect **Bill To Layout** or select a layout profile to use as your template.
- 9 In the **Page Layout Name** field, specify the name of the new read only page layout. For example, Infor Back Office Connect READ ONLY Bill-to.
- 10 Click **Save**.

Note: Make note of the Related Lists in the Mini Page Layout window.

Note: Use standardized naming conventions for your custom objects to ensure that they are easily identifiable by the Infor Back Office Connect Administrator or Implementer.

Removing new buttons from bill-to related lists on the read only bill-to page layout

When the Infor Back Office Connect Read Only Bill-to Page Layout is created, new buttons associated with Related Lists display on the page. These new buttons must be removed.

To remove a new button from a Bill-to related list:

- 1 In the Bill-to (Managed) window, go the Page Layout section.
- 2 Click the Infor Back Office Connect READ ONLY Bill-to Edit link.
- 3 Go to the Addresses section and click the **Wrench** button.
- 4 In the Related Lists Properties - Addresses window, click the Buttons Plus (+) button.
- 5 In the Selected Buttons section, select **New Address**.
- 6 Click **Remove**.
- 7 Click **OK**.
- 8 Repeat Steps 3 through 7 for these related lists:
 - Related List Properties - Contacts Roles**
Remove New Contact Role.
 - Related List Properties - Pay-from Records**
Clear the New standard button.
- 9 Click **OK**.
- 10 Click **Save**.
- 11 In the Custom Object Bill-to (Managed) window, click **Page Layout > Page Layout Assignment**.
- 12 Click **Edit Assignment**.
- 13 In the Profiles column, select Infor Back Office Connect READ ONLY User.
- 14 In the **Page Layout To Use** field, select Infor Back Office Connect **READ ONLY Bill-to** page layout option.
- 15 Click **Save**.

Creating an Infor Back Office Connect read only pay-from page layout

An Infor Back Office Connect Read Only Pay-from Page Layout must be assigned to Infor Back Office Connect Read Only profile users.

To create an Infor Back Office Connect Read Only Pay-from Page Layout:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Create > Objects**.
- 5 In the Label column, click the **Pay-from** link.
- 6 In the Pay-from (Managed) window, go to the **Page Layouts** section.
- 7 Click **New**.
- 8 In the **Existing Page Layout** field, select Infor Back Office Connect **Pay From Layout** or select a layout profile to use as your template.
- 9 In the **Page Layout Name** field, specify the name of the new read only page layout. For example, Infor Back Office Connect READ ONLY Pay-from.
- 10 Click **Save**.

Note: Make note of the Related Lists in the Mini Page Layout window.

Note: Use standardized naming conventions for your custom objects to ensure that they are easily identifiable by the Infor Back Office Connect Administrator or Implementer.

Removing new buttons from pay-from related lists on the read only page layout

When the Infor Back Office Connect Read Only Page Layout is created, new buttons associated with Related Lists display on the page. These new buttons must be removed.

To remove a new button from a Pay-from related list:

- 1 In the Pay-from (Managed) window, go to the Page Layout section.
- 2 Click the Infor Back Office Connect READ ONLY Pay-from Edit link.
- 3 Go to the Addresses section and click the **Wrench** button.
- 4 In the Related Lists Properties - Addresses window, click the Buttons Plus (+) button.
- 5 In the Selected Buttons section, select **New Address**.
- 6 Click **Remove**.
- 7 Click **OK**.
- 8 Repeat Steps 3 through 7 for the Contacts related list:

Related List Properties - Contacts

Remove New Contact Role.

- 9 Click **OK**.
- 10 Click **Save**.
- 11 In the Custom Object Pay-from (Managed) window, click **Page Layout > Page Layout Assignment**.
- 12 **Edit Assignment**.
- 13 In the Profiles column, select Infor Back Office Connect **READ ONLY User**.
- 14 In the **Page Layout To Use** field, select Infor Back Office Connect **READ ONLY Pay-from** page layout option.
- 15 Click **Save**.

Creating an Infor Back Office Connect read only ship-to page layout

An Infor Back Office Connect Read Only Ship-to Page Layout must be assigned to Infor Back Office Connect Read Only profile users.

To create an Infor Back Office Connect Read Only Ship-to Page Layout:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Your name > Setup**.
- 4 In the sidebar column, select **App Setup > Create > Objects**.
- 5 In the Label column, click the **Ship-to** link.
- 6 In the Ship-to (Managed) window, go to the **Page Layouts Related List** section.
- 7 Click **New**.
- 8 In the **Existing Page Layout** field, select Infor Back Office Connect **Ship-to Layout** or specify a layout profile to use as your template.
- 9 In the **Page Layout Name** field, specify the name of the new read only page layout. For example, Infor Back Office Connect READ ONLY Ship-to.
- 10 Click **Save**.

Note: Make note of the Related Lists in the Mini Page Layout window.

Note: Use standardized naming conventions for your custom objects to ensure that they are easily identifiable by the Infor Back Office Connect Administrator or Implementer.

Removing new buttons from ship-to related lists on the read only page layout

When the Infor Back Office Connect Read Only Page Layout is created, new buttons associated with Related Lists display on the page. These new buttons must be removed.

To remove a new button from a Ship-to related list:

- 1 In the Ship-to (Managed) window, go to the Page Layout section.
- 2 Click the Infor Back Office Connect READ ONLY Ship-to Edit link.
- 3 Go to the Addresses section and click the **Wrench** button.
- 4 In the Related Lists Properties - Addresses window, click the Buttons Plus (+) button.
- 5 In the Selected Buttons section, select **New Address**.
- 6 Click **Remove**.
- 7 Click **OK**.
- 8 Repeat Steps 3 through 7 for these related lists:
 - Related List Properties - Accounts**
Remove New Account.
 - Related List Properties - Contacts**
Remove New Contact Role.
 - Related List Properties - Bill-to Records**
Clear the New standard check box.
- 9 Click **OK**.
- 10 Click **Save**.
- 11 In the Custom Object Ship-to (Managed) window, click **Page Layout > Page Layout Assignment**.
- 12 **Edit Assignment**.
- 13 In the Profiles column, select Infor Back Office Connect **READ ONLY User**.
- 14 In the **Page Layout To Use** field, select Infor Back Office Connect **READ ONLY Ship-to** page layout option.
- 15 Click **Save**.

Eliminating optional master data dependency

Implementations currently using the Account Ship-to, Bill-to, or Pay-from many-to-many relationships can remove the many-to-many Master Data dependency from the Infor Back Office Connect implementation based upon their business needs.

Eliminating the optional master data dependency results in these changes:

- A reduction in storage requirements for your data. Specifically, the Account Bill-to Role, Account Ship-to Role, Bill-to Pay-from Role, and the Ship-to Bill-to Role junction objects are no longer used.

- Bill-to, Pay-from, and Ship-to records are created and updated in ERP only. These records are not sent from ERP to Infor Back Office Connect, and the records do not exist in Infor Back Office Connect. Instead, the name and address information for Bill-to, Pay-from, and Ship-to records are part of each transaction record.
- To view Bill-to, Pay-from, and Ship-to transaction data for quotes, orders, and invoices, you must search for the Bill-to, Pay-from, and Ship-to records by name.

To eliminate optional master data:

- 1 Disable the desired BODs in the **BOD Type Version** tab.

Note: Disable the Nouns in ION Desktop Document Flow to avoid unsupported Inbound BOD errors in Infor Back Office Connect.

- 2 Remove Transactional Data dependencies by clearing the active flag in the BOD Field Mapping for each of these dependent Lookup fields:

- Ship-to

InvoiceLine__c.shipto__c, QuoteLineItem__c.shipto__c, Quote__c.shipto__c, SalesOrderLine__c.shiptoid__c, SalesOrder__c.shipto__c, and Shipment__c.extshipto__c.

- Bill-to

CustomerReturn__c.billto__c, Invoice__c.billto__c, Quote__c.billto__c, Receivable__c.billto__c, and SalesOrder__c.billto__c.

- Pay-from

Quote__c.payfrom__c, Receivable__c.payfrom__c, and SalesOrder__c.payfrom__c.

- 3 Remove the pre-existing master data.
 - a Log in to the Data Loader as the Integration User.
 - b Export the SFDC ID for the desired objects (Ship-to, Bill-to, and Pay-from records and Account Ship-to Roles, Account Bill-to Roles, Ship-to Bill to Roles, and Bill-to Pay-from Roles).
 - c Delete the records based on the export file.



Caution: Deleting Ship-to, Bill-to, or Pay-from records with any user other than the integration user will result in DELETE BODs being sent to your ERP system of record. Always use the Integration User login for data clean-up processes.

Address line validation rules (optional)

Infor Back Office Connect uses the standard Salesforce Street Address Line for the multiple address lines that are mapped in the BOD. To help with data quality, below are steps on how to add sample validation rules for each of the objects that have a Street Address. They are currently configured to allow only 5 address lines that are each limited to 100 characters. You can change the length of the

line by replacing each of the 100 with the desired length. For fewer lines, you can remove the last REGEX line and the comma on the previous line to reduce it to 4 lines.

Account and contact object address line validation rules

These are the steps for adding sample validation rules for the Account and Contact objects.

To add Account and Contact object address line validation rules:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Customize > Accounts > Validation Rules..**
- 5 Click **New**.
- 6 Specify this information:

Rule Name

The name of the validation rule.

Error Condition Formula

The error condition formula of the validation rule. This is the Account Object Validation Rule:

```
NOT (OR (REGEX (BillingStreet, ".{0,100}"),
REGEX (BillingStreet, ".{0,100}\r\n.{0,100}"),
REGEX (BillingStreet, ".{0,100}\r\n.{0,100}\r\n.{0,100}"),
REGEX (BillingStreet, ".{0,100}\r\n.{0,100}\r\n.{0,100}\r\n.{0,100}"),
REGEX (BillingStreet, ".{0,100}\r\n.{0,100}\r\n.{0,100}\r\n.{0,100}\r\n.
{0,100}"))
))
```

This is the Contact Object Validation Rule:

```
NOT (OR (REGEX (MailingStreet, ".{0,100}"),
REGEX (MailingStreet, ".{0,100}\r\n.{0,100}"),
REGEX (MailingStreet, ".{0,100}\r\n.{0,100}\r\n.{0,100}"),
REGEX (MailingStreet, ".{0,100}\r\n.{0,100}\r\n.{0,100}\r\n.{0,100}"),
REGEX (MailingStreet, ".{0,100}\r\n.{0,100}\r\n.{0,100}\r\n.{0,100}\r\n.
{0,100}"))
))
```

Error Message

The message that appears when the Error Condition formula is true. This is the sample error message: The address entered has a line longer than 100 characters or more than 5 lines.

- 7 Click **Save**.

Bill-to, pay-from, and ship-to object address line validation rules

These are the steps for adding sample validation rules for the Bill-to, Pay-from, and Ship-to objects.

To add Bill-to, Pay-from, and Ship-to object address line validation rules:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Create > Objects > Bill-to > Validation Rules**.
- 5 Click **New**.
- 6 Specify this information:

Rule Name

The name of the validation rule.

Error Condition Formula

The error condition formula of the validation rule. This is the Bill-to, Pay-from, and Ship-to Object Validation Rule:

```
NOT (OR (REGEX (InForceEW__Primaryaddressstreet__c, ".{0,100}"),  
REGEX (InForceEW__Primaryaddressstreet__c, ".{0,100}\\r\\n.{0,100}"),  
REGEX (InForceEW__Primaryaddressstreet__c, ".{0,100}\\r\\n.{0,100}\\r\\n.{0,  
100}"),  
REGEX (InForceEW__Primaryaddressstreet__c, ".{0,100}\\r\\n.{0,100}\\r\\n.{0,  
100}\\r\\n.{0,100}"),  
REGEX (InForceEW__Primaryaddressstreet__c, ".{0,100}\\r\\n.{0,100}\\r\\n.{0,  
100}\\r\\n.{0,100}\\r\\n.{0,100}"))))
```

Error Message

The message that appears when the Error Condition formula is true. This is the sample error message: The address entered has a line longer than 100 characters or more than 5 lines.

- 7 Click **Save**.

This chapter describes the tasks that you must complete to customize Infor Back Office Connect to meet your business requirements.

Many of the steps required to customize Infor Back Office Connect involve making modifications to the inbound and outbound BOD documents and BOD field mappings that are published in the default BOD data set, or seed data, that is installed during the Infor Back Office Connect installation. Detailed information on the default data set is published in the *Infor Back Office Connect BOD Mapping and Descriptions (Inbound)* and *Infor Back Office Connect BOD Mapping and Descriptions (Outbound)* guides. See also "Understanding BODs" on page 257.

Note: We recommend that Infor Back Office Connect administrators or developers attempting to customize Infor Back Office Connect have experience in XML messaging and working with BODs and basic knowledge of writing Salesforce Object Query Language (SOQL) queries.

Understanding the reasons for customizing Infor Back Office Connect

These are the primary reasons for customizing Infor Back Office Connect:

- To add new fields to support inbound or outbound processes. To add new fields, you must update the corresponding inbound or outbound BODs to include the new fields.
- To update inbound or outbound BODs to change the value of an element in the inbound or outbound BOD. For example, the default value of the <CustomerStatus> element in a BOD is Inactive. However, you want to change the default value of the element to Active, and to do so you must update the BOD containing the element.
- To create test debugging scenarios. If BODs are generating errors due to information that is missing from the ERP, the inbound and/or outbound BODs can be updated to test possible solutions.
- To create a new BOD to support inbound and outbound message processes. You can create new BODs Infor Back Office Connect Any BOD if you create a new custom object in Infor Back Office Connect or Salesforce or if you create new business processes that are not supported by the default Infor Back Office Connect BODs or the or the BODs that are supported by your ERP. See "Any BOD" on page 105.

Note: Each ERP system has a comprehensive set of fields that are mapped to the core Infor Back Office Connect BOD types. The Infor Back Office Connect integration uses only a subset of these fields. If you require additional fields supported by your ERP system, you can add those fields to the Infor Back Office Connect inbound and outbound BOD mappings and the actual BOD XML without having to create a new BOD. See the BOD documentation for your ERP to view the comprehensive list of fields supported by the ERP.

Understanding the Infor Back Office Connect objects used to modify default BOD XML documents

This table shows the Infor Back Office Connect objects used to modify default BOD XML documents with a brief description of each object:

Infor Back Office Connect object	Description
Inbound Messages	
Outbound Messages	
Bod Entity Mappings	
Bod Field Mappings	
Bod Types	
Bod Type Versions	
Message Source	
Message Source BOD Type Versions	

Overview of Infor Back Office Connect BOD mapping documents

The default BOD data set is published in the *Infor Back Office Connect BOD Mapping and Descriptions (Inbound)* and *Infor Back Office Connect BOD Mapping and Descriptions (Outbound)* guides. See also "Understanding BODs" on page 257.

The *Infor Back Office Connect BOD Mapping and Descriptions (Inbound)* guide includes:

- Descriptions of every BOD mapped to Infor Back Office Connect to support inbound SYNC (BOD) processing
- Each BOD contains all of the Salesforce and Infor Back Office Connect fields mapped to inbound SYNC BODs

The *Infor Back Office Connect BOD Mapping and Descriptions (Outbound)* guide includes:

- Descriptions of every BOD mapped to Infor Back Office Connect to support outbound PROCESS (BOD) processing
- Each BOD contains all of the Salesforce and Infor Back Office Connect fields mapped to an outbound PROCESS BODs

Viewing inbound messages

The functionality to view Inbound messages is primarily for administrative diagnostics. In some cases the administrator can decide to clear the **Processing Status**, **Retry Count** and **Was Processed** indicator to reprocess a BOD after resolving the root cause of the previous processing error.

To view an inbound message:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
 - 2 From the Force.com App Menu select Infor Back Office Connect Administration.
 - 3 Click the **Inbound Messages** tab.
 - 4 Select the desired filter from the View list and click **Go!** to display the list of inbound messages.
 - 5 In the **Message ID** column, click the hyperlink of the message ID to display the Inbound Message Detail page. For example, click [USALVICRMBW2K84-51535-1361102258711-2:0:99:1:1](#).
 - 6 The following fields are displayed in the Information section:
 - **Message ID:** The Message ID is a unique identifier for the message. For example, ID:USALVICRMBW2K84-51535-1361102258711-2:0:99:1:1.
 - **Message Type:** The message type consists of a BOD pairing the BOD verb Sync, Show, or Confirm and the BOD noun. For example, Sync.CustomerPartyMaster.
 - **Retry Count:** The value displayed indicates the number of attempts that have been made to reprocess the message.
 - **Message Priority:** The **Message Priority** field displays the system generated message priority based on where the BOD noun falls in the BOD dependency order.
 - **Accounting Entity:** The **Accounting Entity** is defined by the integrated ERP. This value is also used in the **Unique ID** for Infor Back Office Connect records.
 - **Logical ID:** The ION **Logical ID** assigned to the integrated ERP. Based on **Logical ID**, ION identifies what connection point to send or receive BODs.
 - **Header XML:** This field displays the header XML of the inbound message.
 - The **Owner** field is read-only and displays the user assigned as the integration context user in Infor Back Office Connect.
 - **Bod XML:** This field displays the XML of the inbound BOD. See "Modifying the BOD XML for an inbound message" on page 77.
- Note:** Large BODs exceeding the Bod XML field size are handled as an attachment to the inbound message.

- **Was Processed:** This field displays a code that indicates the processing status of the BOD. If a processing error occurs, the code helps the administrator determine where the error occurred and troubleshoot the error. The table explains the valid values.

Value	Description
0	Not processed - awaiting processing.
1	Processed without error
9	ERP Error
99	Variation Error
999	Salesforce error

Note: A variation ID is assigned to a BOD by Infor Back Office Connect to identify the number of times a record with a specific set of attributes has been published for the accounting entity and location. The variation ID is used to ensure that Infor Back Office Connect is reading in the latest version of the BOD. For example, a BOD with a variation ID of 5 is received and processed. If then Infor Back Office Connect receives another BOD for the same record with a variation ID 4, the outdated information is automatically detected and discarded by the system. The integration setup step 4 provides the option of handling Variation errors as an error resulting in a **Was Processed** value of 99.

- **Marked as Processed:** This field displays a code that indicates whether the message was received by Infor Back Office Connect. Valid values are:

Value	Description
0	New message not yet confirmed
1	Message receipt has been confirmed back to ION.

- **Processing Status:** This field indicates the current status of the message in the processing life cycle. Valid values are:

Value	Description
None	Message processing has not been initiated for the message
In Process	The message has been added to the scheduled job queue
Completed	The message was processed.

- **Error Message:** If a processing error occurred, this field displays the message associated with the processing issue.

Modifying the BOD XML for an inbound message

In previous versions of Infor Back Office Connect (prior to version 10.8), BOD XML content was accessed from the Notes & Attachments related list. To reduce storage requirements for the Infor Back Office Connect application, XML attachments have been replaced with an editable Bod XML field, from which you can copy and edit the BOD XML content of an inbound message in a text editor to modify the XML as necessary.

To modify the BOD XML for an inbound message:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 From the Force.com App Menu select Infor Back Office Connect Administration.
- 3 Click the **Inbound Messages** tab.
- 4 Select **All** from the View list and click **Go!** to display the complete list of inbound messages.
- 5 In the **Message ID** column, click the hyperlink of the message ID to display the Inbound Message Detail page. For example, click [USALVICRMBW2K84-51535-1361102258711-2:0:99:1:1](#).
- 6 Click **Edit** to display the Inbound Message Edit page.
- 7 Locate the **Bod XML** field, and copy the XML content to the clipboard.
- 8 Paste the XML content into a text editor.
- 9 Modify the XML based on your business requirements.
Note: All BOD XML files must first be linearized in order for Infor Back Office Connect to read them.
- 10 Copy the updated XML from the text editor to the clipboard.
- 11 Paste the updated XML from the clipboard to the **Bod XML** field.
- 12 Specify **0** as the value for the **Retry Count** field.
- 13 Specify **0** as the value for the **Was Processed** field.
- 14 Select **--None--** as the value of the **Processing Status** field.
- 15 Click **Save**.

Modifying outbound messages

This section describes the steps required to modify an outbound message.

To modify an outbound message:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 From the Force.com App Menu select Infor Back Office Connect Administration.
- 3 Click the **Outbound Messages** tab.
- 4 Select **All** from the View list and click **Go!** to display the complete list of inbound messages.
- 5 In the **Message ID** column, click the hyperlink of the message ID to display the Outbound Message Detail page. For example, click [USALVICRMBW2K84-51535-1361102258711-2:0:99:1:1](#).
- 6 Click **Edit** to display the Outbound Message Edit page.

7 In the Information section, edit or update the information for these fields as necessary:

- **Message ID:** The Message ID is a unique identifier for the message. For example, ID:USALVICRMBW2K84-51535-1361102258711-2:0:99:1:1.
- **Message Type:** The message type consists of a BOD pairing beginning the BOD verb Sync, Show, or Confirm and the BOD noun. For example, Sync.CustomerPartyMaster.
- **Header XML:** This field displays the header XML of the inbound message.
- The **Owner** field is read-only and displays the user assigned as the integration context user in Infor Back Office Connect.
- **Bod XML:** This field displays the XML of the inbound BOD. You can copy and edit the BOD XML as necessary. See "Modifying the BOD XML for an inbound message" on page 77.

Note: The **Bod XML** field replaces attachments used in previous editions of Infor Back Office Connect.

- **Processing Complete:** This field displays a code that indicates the processing status of the BOD. If a processing error occurs, the code helps the administrator determine where the error occurred and troubleshoot the error. Valid values are: 9=ERP Error, 1=Processed without error, 99=variation ID error, 999=Salesforce error, and 0=not processed - awaiting processing.

Note: A variation ID is assigned to a BOD by Infor Back Office Connect to identify the number of times a record with a specific set of attributes has been published for the accounting entity and location. The variation ID is used to ensure that Infor Back Office Connect is reading in the latest version of the BOD. For example, a BOD with a variation ID of 5 is received and read in Infor Back Office Connect. Infor Back Office Connect then receives another BOD for the same record with a variation ID of 4. Upon receiving the BOD with the variance ID of 4, this BOD is assigned a processing status of 99 to indicate that the variation ID of 4 is older than the variation ID of 5.

- **Error Message:** If a processing error occurred, this field displays the message associated with the processing issue.

8 Click **Save**.

Modifying the BOD XML for an outbound message

In previous versions of Infor Back Office Connect (prior to version 10.8), BOD XML content was accessed from the Notes & Attachments related list. To reduce storage requirements for the Infor Back Office Connect application, XML attachments have been replaced with an editable Bod XML field, from which you can copy and edit the BOD XML content of an outbound message in a text editor to modify the XML as necessary.

To modify the BOD XML for an outbound message:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 From the Force.com App Menu select Infor Back Office Connect Administration.
- 3 Click the **Outbound Messages** tab.
- 4 Select **All** from the View list and click **Go!** to display the complete list of outbound messages.

- 5 In the **Message ID** column, click the hyperlink of the message ID to display the Outbound Message Detail page. For example, click [USALVICRMBW2K84-51535-1361102258711-2:0:99:1:1](#).
- 6 Click **Edit** to display the Outbound Message Edit page.
- 7 Locate the **Bod XML** field, and copy the XML content to the clipboard.
- 8 Paste the XML content into a text editor.
- 9 Modify the XML based on your business requirements.
Note: All BOD XML files must first be linearized in order for Infor Back Office Connect to read them.
- 10 Copy the updated XML from the text editor to the clipboard.
- 11 Paste the updated XML from the clipboard to the **Bod XML** field.
- 12 Click **Save**.

Customizing Infor Back Office Connect

After installing and configuring Infor Back Office Connect, you can customize Infor Back Office Connect to meet your business requirements. By default, the Infor Back Office Connect application installs the Business Object Documents (BOD) used to communicate data between ERP and Salesforce. These default BODs include a default data set configured to the specifications of your ERP.

By customizing Infor Back Office Connect to your business requirements, you can add, change, and remove data elements and fields on Infor Back Office Connect and Salesforce objects and modify the default Infor Back Office Connect BOD Mapping documents to support customization in both Infor Back Office Connect and ERP.

You can customize Infor Back Office Connect in these ways:

- Create new field mappings for inbound data elements in BOD messages to populate data from ERP into custom fields added in Infor Back Office Connect
- Customize outbound BOD messages to publish data from custom fields added in Infor Back Office Connect to ERP
- Configure Infor Back Office Connect to conditionally publish outbound BOD messages based on specific business requirements and rules

The default BOD data set containing all the standard BOD field mappings is published in the *Infor Back Office Connect BOD Mappings and Descriptions (Inbound)* and *Infor Back Office Connect BOD Mappings and Descriptions (Outbound)* guides. These guides are available for download on the **Integration Setup** tab of the Infor Back Office Connect application.

Because Infor Back Office Connect is integrated with your ERP, the process of adding customizations to inbound messages may require you to make changes in both Infor Back Office Connect and ERP.

To begin the inbound BOD customization process in your ERP, you must first determine which BOD(s) contain the field(s) you want to add to Infor Back Office Connect and confirm that the BOD does not already include the desired field(s). If the field(s) exist in the BOD(s), you do not need to update the BOD. If the field(s) do not exist, you will need to add the field(s) to the UserArea in the BOD. See "Adding custom fields to a BOD document" on page 80.

This section describes the tasks that you must complete in Infor Back Office Connect and ERP to add customizations to inbound messages in Infor Back Office Connect.

Customizing inbound messages

Inbound messages are generated in ERP and sent to Infor Back Office Connect. See "Understanding inbound message processing" on page 266. These inbound messages trigger field updates in Infor Back Office Connect and communicate processing error messages and statuses. Inbound messages can be viewed by Infor Back Office Connect administrators on the **Inbound Messages** tab in Infor Back Office Connect.

The *Infor Back Office Connect BOD Mapping and Descriptions (Inbound)* guide describes all the fields that are currently mapped for synchronization in Infor Back Office Connect. After reviewing this document and speaking with Infor Back Office Connect users, you can determine which custom fields should be added to the current Infor Back Office Connect BOD Mappings.

Adding custom fields to a BOD document

After determining which BOD(s) contain the field(s) you want to add to Infor Back Office Connect and confirming that the BOD does not already include the desired field(s), add the field(s) to the user area in the BOD. To add the field(s) to the BOD:

- Locate the BOD user area. See "Locating the BOD user area" on page 80.
- Update the property element in the BOD to include the field. See "Updating a property element" on page 81.

Locating the BOD user area

The user area is a user-defined field section of a BOD document that contains information that is not included in the standard BOD field descriptions. User-defined fields can be fields used by ERP or additional fields requested by the Salesforce or Infor Back Office Connect user.

The user area is housed within the <UserArea> element and is usually located at the end of a BOD document. User-defined fields are always published using the <Property> element. This sample shows a user area containing several property elements:

```
<UserArea>
<Property>
<NameValue name="ln.SalesIndicator" type="IndicatorType">>false</Name
Value>
</Property>
<Property>
<NameValue name="ln.ProductionIndicator" type="IndicatorType">>false</
NameValue>
</Property>
<Property>
```

```
<NameValue name="ln.CostingIndicator" type="IndicatorType">>false</NameValue>
</Property>

</UserArea>
```

Updating a property element

To create a custom field in a BOD document, the ERP user must enter the user-defined field (UDF) or custom field information into the property element in the user area of the BOD. The UDF property must include information for the <NameValue name> and <Type> elements and a description. This is an example of a properly formed property element containing a custom field for Sales Indicator:

```
<Property>
<NameValue name="ln.SalesIndicator" type="IndicatorType">>false</NameValue>
</Property>
```

The <NameValue name> element is used to define the name-value pair. For example, if you want to add a custom field called Amount, add this to the <Property> element in the user area: <NameValue name="CustomAmountField"

The description part of the element contains a general description of the custom field and its use. For example, in this <NameValue name="ln.SalesIndicator" type="IndicatorType">>false</NameValue> custom field, **false** is the description.

Creating custom fields in Infor Back Office Connect

When Infor Back Office Connect receives inbound messages from ION, the updates are targeted to specific fields in Infor Back Office Connect. If the target field does not exist in Infor Back Office Connect or Salesforce, you must create a custom field.

After adding the custom field, you can then map the custom field to receive the custom field in inbound messages.

Complete these tasks to create custom fields in Infor Back Office Connect:

- Create the custom field(s) in Salesforce. You can create custom fields by customizing a standard object, such as Accounts, Contacts, or by creating a custom object. See Salesforce documentation.
- Make a note of the object where you added the custom field. For example, if the custom field is added to the Salesforce standard Account object, the Object Name is Account.
- Make a note of the API name assigned to the custom field on the object on which it was created. This information is located in the [Object Name] Custom Fields & Relationships section. For example, if the custom field is Toll Free #, the API name would be Toll_Free__c.
- Create the custom field mapping to receive inbound messages. See "Creating new BOD field mappings in Infor Back Office Connect" on page 82.

Creating new BOD field mappings in Infor Back Office Connect

Create new BOD field mappings to customize the inbound data import process. Inbound BOD field mappings are associated with a particular BOD Type Version. As updated mappings are created, new BOD schema versions become available. When an inbound message is received, the message source is verified to determine which associated BOD Type Versions can be used to parse the message.

Note: Information on the relationships between objects and fields is located on the Fields page for a particular object. To access information on the Contacts object fields, select **Setup** and then select **App Setup > Customize > Contacts > Fields** in the sidebar column.

When Infor Back Office Connect processes the inbound BOD, it locates the highest version ID number found in the BOD Type Version Name to parse the message. For example, if there are multiple versions of the SyncCustomerPartyMaster BOD numbered BTV-0000000000 to BTV-0000000040, Infor Back Office Connect will process BTV-0000000040.

Note: BOD type versions are backwards compatible with prior BOD type versions.

To create new BOD field mappings in Infor Back Office Connect:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 Click the plus icon (+) to display all tabs.
- 3 In the All Tabs list, click [Message Sources](#).
- 4 Click **Go!** to display the configured message sources.
- 5 Click the message source name to display the message source details. The message source details display a list of all available BOD type versions for the configured ERP.
- 6 In the Messages Source BOD Type Versions list, click the hyperlink of the BOD type version name to display the message source BOD version details. For example, click [MSBTV-0002](#).
- 7 In the Message Source BOD Type Detail section, click the hyperlink of the BOD type version to display the BOD Type Version Detail page. For example, click [BTV-0000000012](#).
- 8 In the Bod Fields Mapping section, click **New Bod Field Mapping**.
- 9 Specify this information:

Bod Field Mapping Name

Specify a descriptive name for the new BOD field mapping. For example, specify **ERP Account Number**.

CRM Entity Name

Specify the Infor Back Office Connect custom object or standard Salesforce object where the field is located. For example, **account**.

Bod Type Version

The Bod type version is automatically populated based on the selected BOD type version.

CRM Attribute Name

Specify the named to display for the field on the object. For example, specify **extid__c**.

BOD Xpath

Specify the BOD element where you can find the field mapping information from the *Infor Back Office Connect BOD Mapping and Descriptions (Inbound)* guide. The value specified must correspond with the related Xpath from the noun element in the BOD XML message. For example, specify **/CustomerPartyMaster/PartyIDs/ID**.

Default Value

Specify the default value for the field that is displayed when the field is visible.

Is Custom

Select the Is Custom check box if the field mapping is a custom mapping. When this option is selected, the Load Seed data will not modify this customized field. Standard records cannot be modified, but can be disabled by clearing the **Active** check box.

Active

Select the Active check box if the field is to be included in the current field mappings for the BOD. Clear the Active check box if the field is to be excluded from the current field mappings.

Mandatory Flag

Select the Mandatory Flag check box if the field is a required field.

Related Object Api Name

Specify the API name associated to the custom field you are mapping.

Field Type

Select the data type associated with the field you are mapping.

10 Click **Save**.

Modifying existing BOD field mappings

To further customize inbound message processing to meet your business requirements, you can also modify existing BOD field mappings to map an existing BOD XPath to a different field.



Caution: BOD type versions must have different version numbers. If a standard BOD type version is cloned to create an Any BOD type version, Infor Back Office Connect will disable the standard BOD type version.

To modify existing BOD field mappings:

- 1** Log in to Salesforce as the Infor Back Office Connect developer.
- 2** Click the plus icon (+) to display all tabs.
- 3** In the All Tabs list, click [Bod Field Mappings](#).
- 4** Select **All** from the View list and click **Go!** to display the complete list of BOD field mappings.
- 5** Locate the Process BOD related to the object on which you added the custom field. For example, if you added a custom field to the Contacts object, locate the ProcessContactMaster BOD type.
- 6** In the **ID** column, click the hyperlink of the BOD field mapping to display the Bod Field Mapping Detail page. For example, click [BFM-0000000000](#).
- 7** Click **Clone** to display the BOD Entity Mapping Edit page.

Note: If you want to disable a BOD Field Mapping, you do not have to clone the mapping first. To disable the field mapping, you can clear the **Active** checkbox for the mapping and save the record.
- 8** In the **BOD XPath** field, specify the new BOD XPath for the existing field mapping.
- 9** Verify that the **Active** check box is selected.

- 10 Complete the additional information that you require on this page
- 11 Click **Save**. A confirmation message is displayed.
- 12 Click **OK**. Clicking **OK** will overwrite any the existing active records for the BOD entity mapping and activate the modified field mapping.

Editing a BOD type version

This section describes the steps required to delete a message source BOD type version.

To delete a message source BOD type version:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 Click the plus icon (+) to display all tabs.
- 3 In the All Tabs list, click [Bod Type Versions](#).
- 4 Select **All** from the View list and click **Go!** to display the complete list of message source BOD type versions.
- 5 In the **ID** column, click the hyperlink of the BOD type version name to display the message source BOD type version details. For example, click [BTV-0000000000](#).
- 6 Click **Edit** to display the BOD Type Version Edit page.
- 7 In the Information section, edit or update the information for these fields as necessary:
 - **BOD Type Version Name:** The BOD Type Version Name defines the schema versions of a BOD type. The combination of the BOD type and BOD schema version indicate the supported combination of a BOD verb and a BOD noun.
 - **BOD Version ID:** The BOD Version ID indicates the specific version or revision number of the BOD. For example, the BOD Version ID is 2.8.0.
 - **BOD Type:** The BOD Type is an alpha-numeric identifier that specifies the BOD type. For example, BT-0000000000 is the BOD Type of the AcknowledgeContactMaster BOD.
 - **BOD Release ID:** The BOD Version ID indicates the specific release version of the BOD. For example, the BOD Release is 9.2.
 - The **Is Custom** check box is selected by default. Clear the check box to indicate that this BOD type version is a standard BOD type version.
 - The **Active** check box is selected by default. Clear the check box if you do not want the BOD type version to be activated when the record is saved.

See "BOD type versions" on page 264f or more information on the iteration or release number assigned to a BOD type version.

- 8 Click **Save**.

Deleting a custom BOD type version

This section describes the steps required to delete a custom BOD type version.

Note: Standard BOD versions cannot be deleted without resulting in custom validation errors. Only custom BOD type versions can be deleted.

To delete a custom BOD type version:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 Click the plus icon (+) to display all tabs.
- 3 In the All Tabs list, click [Bod Type Versions](#).
- 4 Select **All** from the View list and click **Go!** to display the complete list of BOD type versions.
- 5 In the **ID** column, click the hyperlink of the custom BOD type version name to display the BOD type version details.
- 6 Click **Delete**. A warning message is displayed.
- 7 Click **OK**. The BOD type version is deleted.

Cloning a BOD type version

This section describes the steps required to clone a BOD type version.



Caution: When you clone a BOD type version, the originating BOD type version is deactivated when you save the cloned record. You can only have one existing BOD type version for an entity at a time.

To clone a BOD type version:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 Click the plus icon (+) to display all tabs.
- 3 In the All Tabs list, click [Bod Type Versions](#).
- 4 Select **All** from the View list and click **Go!** to display the complete list of BOD type versions.
- 5 In the **ID** column, click the hyperlink of the BOD type version name to display the Bod Type Version Detail page.
- 6 Click **Clone** to display the BOD Type Version Edit page.
- 7 By default, all of the fields in the Information section are populated from the cloned BOD type version record to the new BOD type version record. Edit or update information for these fields as necessary:
 - **BOD Type Version Name:** The BOD Type Version Name defines the schema versions of a BOD type. The combination of the BOD type and BOD schema version indicate the supported combination of a BOD verb and a BOD noun.
 - **BOD Version ID:** The BOD Version ID indicates the specific version or revision number of the BOD. For example, the BOD Version ID is 2.8.0.
 - **BOD Type:** The BOD Type is an alpha-numeric identifier that specifies the BOD type. For example, BT-0000000000 is the BOD Type of the AcknowledgeContactMaster BOD.
 - **BOD Release ID:** The BOD Version ID indicates the specific release version of the BOD. For example, the BOD Release is 9.2.
 - The **Is Custom** check box is selected by default. Clear the check box to indicate that this BOD type version is a standard BOD type version.
 - The **Active** check box is selected by default. Clear the check box if you do not want the BOD type version to be activated when the record is saved.

Note: See "BOD type versions" on page 264 for more information on the iteration or release number assigned to a BOD type version.

8 Click **Save**.

Creating a message source BOD type version

This section describes the steps required to create a message BOD type version clone a BOD type version.

To create a message BOD type version clone a BOD type version:

- 1** Log in to Salesforce as the Infor Back Office Connect developer.
- 2** Click the plus icon (+) to display all tabs.
- 3** Click **Go!** to display the In the All Tabs list, click [Message Source BOD Type Versions](#).
- 4** Click **New** to display the Message Source BOD Type Version Edit page.
- 5** In the Information section, specify information for these fields:
 - In the **BOD Type Version** lookup, select the BOD type version for the message source BOD type definition. See "BOD type versions" on page 264.
 - In the Message Source lookup, select the message source for the message source BOD type definition. See "Mapping the BOD type version" on page 109.

6 Click **Save**.

Cloning a message source BOD type version

This section describes the steps required to clone a message source BOD type version.

To clone a message source BOD type version:

- 1** Log in to Salesforce as the Infor Back Office Connect developer.
- 2** Click the plus icon (+) to display all tabs.
- 3** In the All Tabs list, click [Message Source BOD Type Versions](#).
- 4** Select **All** from the View list and click **Go!** to display the complete list of message source BOD type versions.
- 5** In the **Message Source BOD Type Version Name** column, click the hyperlink of the message source BOD type version name to display the message source BOD type version details.
- 6** Click **Clone** to display the Message Source BOD Type Edit page.
- 7** In the Information section

Bod Type Version

The Bod type version is automatically populated based on the selected BOD type version.

Back Office

The default value is Message Source. To modify the value, specify the ERP that is your system of record. The message source is the application you are integrating with Infor Back Office Connect through ION. For example, ERP LN.

- 8 Click **Save**.

Deleting a message source BOD type version

This section describes the steps required to delete a message source BOD type version.

To delete a message source BOD type version:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 Click the plus icon (+) to display all tabs.
- 3 In the All Tabs list, click [Message Source BOD Type Versions](#).
- 4 Select **All** from the View list and click **Go!** to display the complete list of message source BOD type versions.
- 5 In the **Message Source BOD Type Version Name** column, click the hyperlink of the message source BOD type version name to display the message source BOD type version details.
- 6 Click **Delete**. A warning message is displayed.
- 7 Click **OK**. The message source BOD type version is deleted.

Recovering a deleted message source BOD type version from the Salesforce recycling bin

If you delete a message source BOD type version, it can be recovered from Salesforce recycling bin for 15 days after it is deleted.

To recover a message source BOD type version from the Salesforce recycling bin:

- 1 In the sidebar column, click [Recycle Bin](#).
- 2 Locate the message source BOD type version to recover from the recycling bin list and select the **Action** check box for the item.
- 3 Click **Undelete**. The recycle bin is refreshed and the selected message source BOD type version is recovered.

Disabling a BOD type version for message source BOD type version

This section describes the steps required to disable a BOD type version for a message source BOD type version.

To disable a BOD type version for a message source BOD type version:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 Click the plus icon (+) to display all tabs.

- 3 In the All Tabs list, click [Message Source BOD Type Versions](#).
- 4 Select **All** from the View list and click **Go!** to display the complete list of message source BOD type versions.
- 5 In the **Message Source BOD Type Version Name** column, click the hyperlink of the message BOD type version name to display the Message Source BOD Type Version Detail page. For example, click [MSBTV-0000](#).
Note: The message source BOD type version record cannot be edited from the Message Source BOD Type Version Detail screen.
- 6 In the BOD Type Version field, click the hyperlink of the BOD type version for the message source to display the Bod Type Version Detail page. For example, click [BTV-0000000005](#).
- 7 Click **Edit** to display the BOD Type Version Edit page.
- 8 In the Information section, clear the **Active** check box to disable the BOD type version for the message source.
- 9 Click **Save**.

Disabling a BOD field mapping

This section describes the steps required to disable a BOD field mapping.

To disable a BOD field mapping:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 Click the plus icon (+) to display all tabs.
- 3 In the All Tabs list, click [BOD Field Mappings](#).
- 4 Select **All** from the View list and click **Go!** to display the complete list of BOD field mappings.
- 5 Locate the Process BOD to disable and click the hyperlink of the BOD field mapping in the **ID** column to display the Bod Field Mapping Detail page. For example, click [BFM-0000000000](#).
- 6 Click **Edit** to display the BOD Entity Mapping Edit page.
- 7 Clear the **Active** checkbox to disable the mapping.
- 8 Click **Save**. A confirmation message is displayed.
- 9 Click **OK**. Clicking **OK** disables the field mapping.

Cloning a message source

This section describes the steps required to clone a message source. See "Multiple back office configuration" on page 141.

To clone a message source:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 Click the plus icon (+) to display all tabs.
- 3 In the All Tabs list, click [Message Sources](#).
- 4 Select **All** from the View list and click **Go!** to display the complete list of message sources.

- 5 In the **Message Source Name** column, click the hyperlink of the message source name to display the Back Office Detail page.
- 6 Click **Clone** to display the Message Source Edit page.
- 7 By default, all of the fields in the Information section are populated from the cloned message source record to the new message source record. See "Configuring message source settings for multiple back office integration" on page 144 for information on the fields in the Information section. Edit or update information for these fields as necessary:
 - **Message Source Name**
 - **Default Accounting Entity ID**
 - **Logical ID**
 - **Default Location ID**
 - **URL**
 - The **Active** check box is selected by default. Clear the check box if you do not want the message source to be activated when the record is saved.
 - In the **Entity Selection** field, select the BOD noun(s) you want to be published to the message source you selected and click << to add the BOD noun(s) to the message source.
- 8 Click **Save**. The cloned message source settings can now be configured in the Step 3. Configure Message Source Settings section of the Integration Setup tab. See "Configuring message source settings" on page 44.

Disabling a message source

This section describes the steps required to clone a message source. See "Multiple back office configuration" on page 141.

To clone a message source:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 Click the plus icon (+) to display all tabs.
- 3 In the All Tabs list, click [Message Sources](#).
- 4 Select **All** from the View list and click **Go!** to display the complete list of message sources.
- 5 In the **Message Source Name** column, click the hyperlink of the message source name to display the Message Source Detail page.
- 6 Click **Edit** to display the Message Source Edit page.
- 7 In the Information section, clear the **Active** check box to disable the message source.
- 8 Click **Save**.

Customizing outbound messages

Infor Back Office Connect administrators and developers can customize outbound data that is sent from Infor Back Office Connect to ERP message source. To customize outbound messages you can:

- Add custom fields
- Modify fields on custom Infor Back Office Connect or standard Salesforce objects
- Customize outbound messages to send the new/modified fields to the ERP message source

The BOD Type Version object plays key role during outbound message processing. This object creates the outbound message XML. The BOD Type version record for each BOD process type contains an XML template. This XML template contains the structure and placeholders for field values. Outbound message processing uses this template to generate the runtime outbound message XML with the object's data. For example, an administrator adds a **Favorite Sports** custom field to the standard Salesforce Contacts object. To configure the output from the Favorite Sports field to update ERP, the administrator must customize the Contact outbound message to publish this new field.

Preparing to add customizations to outbound messages in Infor Back Office Connect

When adding customizations to outbound messages, you must modify PROCESS BOD types.

To add customizations to outbound messages in Infor Back Office Connect:

- Log in to Salesforce as the Infor Back Office Connect developer.
- Stop the scheduler and verify that it is stopped. See "Stopping the scheduler" on page 151 and "Verifying whether the scheduler is stopped" on page 151.
- Create the custom field(s) in Salesforce. You can create custom fields by customizing a standard object, such as Accounts or Contacts. See Salesforce documentation.
- When you create the custom field(s), make a note of the object where you added the custom field, the field label, the field data type, and the field API name. See "Creating custom fields in Infor Back Office Connect" on page 81
- Locate the BOD type version template associated with the intended object and operation of the custom field.

Downloading a BOD type version template for a Process BOD

Download a BOD type version template to modify the XML content to add BOD field mappings for custom fields for outbound BOD processing.

To download a BOD type version template for a Process BOD:

- 1 Log in to Salesforce as the developer.
- 2 Click the plus icon (+) to display all tabs.
- 3 In the All Tabs list, click [Bod Type Versions](#).
- 4 Click **Go!** to display the complete list of BOD type versions.
- 5 Locate the Process BOD related to the object on which you added the custom field. For example, if you added a custom field to the Contacts object, locate the ProcessContactMaster BOD type.
- 6 In the **ID** column, click the hyperlink of the BOD type version to display the Bod Type Version page. For example, click [BTV-0000000005](#).

- 7 In the Notes & Attachments section, click the hyperlink of the title of the XML file to display the Attached File page. For example, click [ProcessContactMaster 9.2-2.8.0.xml](#).
- 8 In the Attachment Details section, right-click [View File](#) and save the attachment to a local drive.

Modifying a BOD type version template for a Process BOD

After downloading a BOD type version template, modify the XML content to add BOD field mappings for custom fields.

To modify a BOD type version template for a Process BOD:

- 1 Locate the downloaded BOD type version template and open the XML file in a text editor.
- 2 Place the cursor in the location within the XML document where you want to add the field.
Note: Add the field in the most useful and logical place for the user. Review the object page layout and compare the field location on the page with the location in the XML file to determine the best place to add the field.
- 3 Add the tag for the new field using this syntax: `<Field Label>{!Object API Name.Field API Name}</Field Label>`. For example, to add a new Toll Free Number field to the BOD, add this tag: `<TollFreeNumber>{!Contact.Toll_free_number__c}</TollFreeNumber>`
- 4 Optionally, add additional tags for other fields.
- 5 Save the changes to the XML file to a local drive.

Attaching a new BOD type version template

After modifying a BOD type version template, attach the XML document to the BOD type version. Before attaching the new BOD type version template, delete the existing document.



Caution: A BOD type version can only have one template attached to it.

To attach a new BOD type version:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 Click the plus icon (+) to display all tabs.
- 3 In the All Tabs list, click [Bod Type Versions](#).
- 4 Click **Go!** to display the complete list of BOD type versions.
- 5 Locate the Process BOD related to the object on which you added the custom field. For example, if you added a custom field to the Contacts object, locate the ProcessContactMaster BOD type.
- 6 In the **ID** column, click the hyperlink of the BOD type version to display the Bod Type Version page. For example, click [BTV-0000000005](#).
- 7 In the Notes & Attachments section, select the BOD type version attachment to replace and click [Del](#). A confirmation message is displayed.
- 8 Click **OK**.
- 9 In the Notes & Attachments section, click **Attach File**.

- 10 Click **Choose File** and locate the XML document to attach.
- 11 Click **Attach File**. A confirmation message is displayed.
- 12 Click **Done**. The BOD type version is attached and outbound messages are updated with the new field.

Configuring conditional outbound message processing

Depending on your business needs, you can configure Infor Back Office Connect to conditionally send outbound BOD messages for synchronization with other applications. You can customize Infor Back Office Connect to send outbound messages based on a trigger event or trigger condition. The BOD Entity Mapping object defines the change events related to a particular BOD using two fields: the **BOD Trigger Event** field and the **BOD Trigger Condition** field.



Caution: The default BOD Entity Mapping object cannot be modified. Infor Back Office Connect administrators and developers must clone the default BOD Entity Mapping and define the clone BOD Entity Mapping to meet your business requirements for outbound processing.

Understanding BOD trigger events

The **BOD Trigger Event** field is a pick list from which you can select one or more triggers to configure the change events that will be published as outbound messages by Infor Back Office Connect. There are currently three trigger event options that can be performed on a BOD: Insert, Update, and Delete. Depending on which of these trigger events are selected, the addition, update, or deletion of a record of the associated CRM entity type will trigger the publishing of an outbound message from Infor Back Office Connect to ERP.

For example, you have a business requirement stating that only new Contacts and updates to existing contacts must be synchronized with the external applications, while the deletion of a contact will not be synchronized. In this scenario, you would select only Insert and Update as the BOD trigger event. See "Creating conditional BOD trigger events and conditions" on page 93.

Understanding BOD trigger conditions

The **BOD Trigger Condition** field is used to define the conditions in which Infor Back Office Connect will publish outbound messages to external applications using Salesforce Object Query Language (SOQL) query statements. See Salesforce documentation.

A BOD Trigger Condition represents a valid SOQL statement that establishes a conditional clause that must be satisfied by the current entity being processed for an outbound message to be published.

For example, you have a business requirement requesting Infor Back Office Connect to send outbound messages for only the Accounts whose status is not Closed. To create this condition, you must open the BOD Entity Mapping record for the CRM entity Account (ProcessCustomerPartyMaster) and then specify this query in the **BOD Trigger Condition** field: `condition = statuscode__c <>'Closed'`

Note: If you are defining multiple BOD trigger conditions for a BOD entity mapping, you must enclose the trigger condition in brackets. For example, `AND(Message_Source_c != null, NOT(IsBlank(Message_Source_c)))`.

Creating conditional BOD trigger events and conditions

Create conditional BOD trigger events and conditions by cloning and customizing BOD entity mappings to configure Infor Back Office Connect to send outbound messages based on the specified events and conditions. See "Understanding BOD trigger events" on page 92 and "Understanding BOD trigger conditions" on page 92. After the conditions are created, Infor Back Office Connect will check these conditions during the run-time processing of an entity to see whether the entity satisfies the conditions.

To create conditional BOD trigger events and conditions:

- 1 Login to Salesforce as the Infor Back Office Connect administrator or Infor Back Office Connect developer.
- 2 Click the plus icon (+) to display all tabs.
- 3 In the All Tabs list, click [Bod Entity Mappings](#).
- 4 Select **All** from the View list and click **Go!** to display the full list of BOD entity mappings.
- 5 In the **ID** column, click the hyperlink of the BOD entity mapping to display the Bod Entity Mapping Detail page. For example, click [BEM-0000000000](#).
- 6 Click **Clone** to display the BOD Entity Mapping Edit page.



Caution: The default BOD Entity Mapping object cannot be modified. When creating a conditional BOD trigger event, you must clone the default BOD entity mapping and then define a cloned BOD entity mapping to meet your business requirements for outbound processing.

- 7 Specify this information:

BOD Entity Mapping Name

Specify a descriptive name for the new BOD field mapping. For example, specify **Custom ERP Account Number**.

CRM Entity Name

Specify the Infor Back Office Connect custom object or standard Salesforce object where the field is located. For example, **account**.

Bod Type

Specify the BOD type for which the entity mappings are being created. The BOD type will be the unique identifier for the BOD. For example, BT-0000000005. This unique identifier is also associated with a BOD noun type. For example, ProcessContactMaster.

Entity Acronym

Specify an abbreviated identifier for the BOD entity mapping function. For example, specify **BT** for Bill-To or **CT** for Contact.

BOD Trigger Event

Specify one or more trigger events that will publish outbound messages.

Sharable

Select the **Sharable** check box if this entity mapping can be shared. If the Sharable check box is selected, Infor Back Office Connect configures the default record owner user as the owner of the record for all associated BODs during data synchronization. See "Creating the default record owner" on page 26.

BOD Trigger Condition

Specify the conditions that will publish outbound messages using Salesforce SOQL query statements.

Note: If you are defining multiple BOD trigger conditions for a BOD entity mapping, you must enclose the trigger condition in brackets. For example, `AND(Message_Source_c != null, NOT(IsBlank(Message_Source_c)))`.

Is Custom

Select the **Is Custom** check box if this entity mapping is being associated with an any BOD. When this option is selected, the Load Seed data will not modify this customized field. Standard records cannot be modified, but can be disabled by clearing the **Is Active** check box.

Handler Class Name

Specify the fully qualified name of a user-defined Java class that extends the Java class for the particular URL protocol. For example, `ContactMasterHandler`.

Is Active

Select the **Is Active** check box to activate this entity mapping. Selecting the **Is Active** check box will overwrite

Sync Direction

Select the type of directional publishing that the entity mapping will process. Valid values are Inbound, Outbound, or Both.

- 8 Click **Save**. A confirmation message is displayed.
- 9 Click **OK**. Clicking **OK** will overwrite any existing active records for the BOD entity mapping.

Working with Infor Back Office Connect BOD objects

Infor Back Office Connect installs a number of custom objects to manage BODs, BOD entity and field mappings, BOD versions and types. This section provides an overview of these Infor Back Office Connect BOD objects and their functionality.

Marking inbound messages for reprocessing

If inbound messages need to be reprocessed, you can manually set the message processing status to reprocess the message.

You can also reprocess inbound messages in batches based on a specified date range, message status(es), and message type(s) on the **Data Management** tab. See "Reprocessing inbound BODs" on page 232.

To mark inbound messages for reprocessing.

- 1 Login to Salesforce as the Infor Back Office Connect administrator or Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Inbound Messages** tab.
- 4 Optionally, select a filter from the View list and click Go! to display the list of inbound messages.
- 5 To edit the record(s) using inline editing, select the checkbox for each inbound BOD record to reprocess.
- 6 Double click the **Was Processed** field to display the Edit Was Processed window.
- 7 Specify "0" as the processing status in the **Was Processed** field.
- 8 In the Apply changes to section, select the check box to apply the changes to **All [number] selected records**.
- 9 Click **Save**.
- 10 Double click the **Processing Status** field to display the Edit Processing Status window.
- 11 Select **--None--** in the **Processing Status** field.
- 12 In the Apply changes to section, select the check box to apply the changes to **All [number] selected records**.
- 13 Click **Save**.
- 14 Repeat these steps for each set to reprocess.

Marking outbound messages for reprocessing

If outbound messages need to be reprocessed, you can manually set the message processing status to reprocess the message.

To mark outbound messages for reprocessing.

- 1 Login to Salesforce as the Infor Back Office Connect administrator or Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Outbound Messages** tab.
- 4 Optionally, select a filter from the View list and click Go! to display the list of outbound messages.
- 5 To edit the record(s) using inline editing, select the checkbox for each outbound BOD record to reprocess.
- 6 Double click the **Processing Complete** field to display the Edit Processing Complete window.
- 7 Specify "0" as the processing status in the **Processing Complete** field.
- 8 In the Apply changes to section, select the check box to apply the changes to **All [number] selected records**.

- 9 Click **Save**.
- 10 Repeat these steps for each set to reprocess

Viewing BOD type names

View BOD type names on the Bod Types custom object.

To view BOD type names:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click Bod Types.
- 5 Select **All** from the View list and click **Go!** to display the complete list of BOD types and their BOD Type Names. For each BOD type record the ID, the BOD type name, the BOD noun, the BOD verb, and whether the BOD is active and/or an any BOD is displayed.
- 6 Optionally, in the **ID** column, click the hyperlink of the BOD type to display the Bod Type Detail page. For example, click BT-0000000005.

Note: Editing the BOD types that are installed by default will cause data processing errors, but Infor Back Office Connect administrators and developers can create additional BOD Types to support business processes. See "Customizing Infor Back Office Connect" on page 79.

Viewing the BOD type version number

View a particular BOD type's BOD type version numbers on the Bod Types Version screen, which is an Infor Back Office Connect custom object.

To view the BOD type version number:

- 1 Login to Salesforce as the Infor Back Office Connect administrator or Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click Bod Types.
- 5 Select **ALL** from the View list and click **Go** to display the complete list of BOD types.
- 6 In the **ID** column, click the hyperlink of the BOD type to display the Bod Type Detail page. For example, click BT-0000000005.
- 7 In the Bod Type Versions section, locate the BOD type version to view.
- 8 In the **ID** column, click the hyperlink of the BOD type version to display the Bod Type Version Detail page. For example, click BTV-0000000005. The full BOD type version number is displayed in **BOD Type Version Name** BOD BOD field. For example, AcknowledgeContactMaster 9.2-2.8.0.

Note: ERP and Infor Back Office Connect must use the same BOD Release ID and BOD Version ID for a particular BOD type to process the BOD successfully.

Updating the BOD Version ID or BOD Release ID

Update a particular BOD type's BOD type version number or release ID on the Bod Type Version Edit page.

To view the BOD type version number:

- 1 Login to Salesforce as the Infor Back Office Connect administrator or Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click [Bod Type Versions](#).
- 5 Select **ALL** from the View list and click **Go!** to display the complete list of BOD Type Versions.
- 6 In the **ID** column, click the hyperlink of the BOD type version to display the Bod Type Version Detail page. For example, click [BTV-0000000005](#). The full BOD type version number is displayed in **BOD Type Version Name** field. For example, AcknowledgeContactMaster 9.2-2.8.0.
- 7 Click **Edit**.

Note: ERP and Infor Back Office Connect must use the same BOD Release ID and BOD Version ID for a particular BOD type to process the BOD successfully.

- 8 In the BOD Type Version Edit page, specify the following:

BOD Version ID

Specify the new BOD Version ID.

BOD Release ID

Specify the new BOD Release ID.

Note: Load Seed Data will not change these values unless the Seed Data value is greater than the value currently in BOD Type Version.

- 9 Click **Save**.

Viewing BOD field mappings in Infor Back Office Connect

View BOD field mappings on the Bod Field Mappings custom object. This object can be used to create new BOD field mappings and edit existing BOD field mappings.

See "Creating new BOD field mappings in Infor Back Office Connect" on page 82 if you want to create new BOD field mappings to customize the inbound data import process.

To view BOD field mappings in Infor Back Office Connect:

- 1 Login to Salesforce as the system administrator or Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click [BOD Field Mappings](#).
- 5 Select **All** from the View list and click **Go!** to display the complete list of BOD field mappings. For each BOD field mapping record this information is displayed:
- 6 View the BOD field mapping information. For each BOD field mapping record this information is displayed:
 - The **ID** field displays a unique identifier for the BOD field mapping. For example, BFM-0000000030
 - The **Bod Field Mapping Name** field displays a descriptive name for the BOD field mapping. For example, ERP Account Number.
 - The **CRM Entity Name** field displays the Infor Back Office Connect custom object or standard Salesforce object where the field is located. For example, account.
 - The **CRM Attribute Name** field displays the API name assigned to the field. For example, extid__c.
 - The **Related Object Api Name** field displays the API name associated with the custom field you are mapping. For example, extid__c.
 - The **Field Type** field displays the data type associated with the field you are mapping. Valid values are Text, Number, Date, Email, Lookup, Master Detail, Role Junction, or Contact Role.

Field Type	Description
Text	Text, Text Area, Checkbox and Pick List field types
Number	Number, Percent, and Currency field types
Date	Date and Date Time field types
Email	Email field types
Lookup	If you add the object name to the front of the CRM Attribute Name followed by a "#", it indicates to Infor Back Office Connect what object to map to. The following example shows how to map the BOD Field Mapping to the salesorder__c object and the salesorderfieldc field in the current object. Infor Back Office Connect will use this to make the relationship to the salesorder__c object for the ID specified in the BOD element. Note for custom objects, remove the __c for the object name. CRM Attribute example: salesorder#salesorderfield__c
Master Detail	Master Detail field types
Role Junction	Supports a many-to-many relationship
Contact Role	Related Contact
Address Street	Address street field types
Primary Address	Primary address field types
Secondary Address	Secondary address field types

Note: You cannot map multiple BOD elements into one object field. This will cause inbound messages to fail.

- The **BOD Xpath** field displays the BOD element where you can find the field mapping information from the *Infor Back Office Connect BOD Mapping and Descriptions (Inbound)* guide. The value specified must correspond with the related Xpath from the noun element in the BOD XML message. For example, CustomerPartyMaster/PartyIDs/ID.
- The **Active** check box indicates whether the field is to be included in the current field mappings for the BOD.
- The **Is Custom** check box indicates whether the field is a custom field. When this option is selected, the Load Seed data will not modify this customized field. Standard records cannot be modified, but can be disabled by clearing the **Active** check box.
- The **Default Value** field displays the default value for the field if the mapped Salesforce field is required and the BOD does not publish a value for the field.
- The **Bod Type Version** field displays the BOD type version associated with the field mapping. See "BOD type versions" on page 264.

Viewing BOD entity mappings in Infor Back Office Connect

View BOD entity mappings on the Bod Entity Mappings custom object.

To view BOD entity mappings in Infor Back Office Connect:

- 1 Login to Salesforce as the Infor Back Office Connect administrator or Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click [Bod Field Mappings](#).
- 5 Select **All** from the View list and click **Go!** to display the complete list of BOD field mappings.
- 6 View the BOD field mapping information. For each BOD field mapping record this information is displayed:
 - The **ID** field displays a unique identifier for the BOD entity mapping. For example, BEM-0000000030
 - The **Bod Entity Mapping Name** field displays the object, and if applicable, the BOD verb/noun pairing for the BOD.

Note: In most cases, the BOD verb is Process. See "BOD nouns" on page 261 and "BOD verbs" on page 262. The entities listed in **Bod Entity Mapping Name** field are subject to two-way update when the BOD verb/noun pairing is referenced. When no BOD pairing is referenced, only one-way (ERP to Infor Back Office Connect) updates are supported.
- The **CRM Entity Name** displays the API name assigned to the field. For example, extid__c.
- The **Entity Acronym** field displays an abbreviated identifier for the BOD entity mapping function. For example, BT for Bill-To or CT for Contact.

- The **Active** check box indicates whether the entity mapping is to be included in the current entity mappings for the BOD.
- The **Is Custom** check box indicates whether the entity mapping is a custom mapping. When this option is selected, the Load Seed data will not modify this customized field. Standard records cannot be modified, but can be disabled by clearing the **Active** check box.
- The **BOD Trigger Event** field displays the trigger events that will publish outbound messages. Valid values are Insert, Update, and Delete. See "Understanding BOD trigger events" on page 92 and "Understanding BOD trigger conditions" on page 92.
- The **BOD Trigger Condition** field display the Salesforce SOQL query statements that establish the conditions that will publish outbound messages.
- The **Field Type** field displays the data type associated with the field you are mapping. Valid values are Text, Number, Date, Email, Lookup, Master Detail, Role Junction, or Contact Role.
- The **Sharable** check box indicates whether this entity mapping can be shared. If the Sharable check box is selected, Infor Back Office Connect configures the default record owner user as the owner of the record for all associated BODs during data synchronization. See "Creating the default record owner" on page 26.
- The **Handler Class Name** field displays the fully qualified name of a user-defined Java class that extends the Java class for the particular URL protocol. For example, ContactMasterHandler.
- The **Sync Direction** field displays type of directional publishing that the entity mapping will process. Valid values are Inbound, Outbound, or Both.

Viewing inbound messages in Infor Back Office Connect

View inbound messages sent from ERP to Infor Back Office Connect on the Inbound Messages custom object.

Note: If an inbound message need to be reprocessed, you can manually reprocess the message. See "Reprocessing inbound BODs" on page 232 and "Marking inbound messages for reprocessing" on page 94.

To view inbound messages in Infor Back Office Connect:

- 1** Login to Salesforce as the Infor Back Office Connect administrator or Infor Back Office Connect developer.
- 2** In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3** Click the **Inbound Messages** tab.
- 4** Select **All** from the View list and click **Go!** to display the complete list of inbound messages.
- 5** View the inbound message information. For each inbound message record this information is displayed:
 - The **Message ID** field displays a unique identifier for the message. For example, ID:USALVICRMBW2K84-51535-1361102258711-2:0:99:1:1.
 - The **Message Type** field displays the type of message. For inbound messages, the message type consists of a BOD pairing beginning the BOD verb Sync, Show, or Confirm and the BOD noun. For example, Sync.CustomerPartyMaster.

- The **Was Processed** field displays a code that indicates the processing status of the BOD. If a processing error occurs, the code helps the administrator determine where the error occurred and troubleshoot the error. Valid values are: 9=ERP Error, 1=Processed without error, 99=variation ID error, 999=Salesforce error, and 0=not processed - awaiting processing.

Note: A variation ID is assigned to a BOD by Infor Back Office Connect to identify the number of times a record with a specific set of attributes has been published for the accounting entity and location. The variation ID is used to ensure that Infor Back Office Connect is reading in the latest version of the BOD. For example, a BOD with a variation ID of 5 is received and read in Infor Back Office Connect. Infor Back Office Connect then receives another BOD for the same record with a variation ID of 4. Upon receiving the BOD with the variance ID of 4, this BOD is assigned a processing status of 99 to indicate that the variation ID of 4 is older than the variation ID of 5.

- If a processing error occurs, the **Error Message** field displays the message associated with the processing issue.
- The **Marked as Processed** field displays a code that indicates whether the message was processed. Valid values are: 1=processed, 0=not processed.
- The **Retry Count** field displays the number of attempts that have been made to reprocess the message.
- The **Created By** field displays the owner of the BOD.
- The **Last Modified Date** field displays the date the message was last processed.
- The **Created Date** field displays the date that the message was created.

Note: All BOD XML files must first be linearized in order for Infor Back Office Connect to read them.

Viewing outbound messages in Infor Back Office Connect

View outbound messages sent from ERP to Infor Back Office Connect on the Outbound Messages custom object.

Note: If an outbound message need to be reprocessed, you can manually set the message processing status to reprocess the message. See "Marking outbound messages for reprocessing" on page 95.

To view outbound messages in Infor Back Office Connect:

- 1 Login to Salesforce as the Infor Back Office Connect administrator or Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Outbound Messages** tab.
- 4 Select **All** from the View list and click **Go!** to display the complete list of outbound messages.
- 5 View the outbound message information. For each outbound message record this information is displayed:
 - The **Message ID** field displays a unique identifier for the BOD entity mapping. For example, BEM-0000000030

- The **Message Type** field displays the unique identifier for the BOD Entity Mapping. For outbound messages, the message type consists of a BOD pairing beginning the BOD verb Process or Confirm. For example, Confirm.BODs.
- The **Was Processed** field displays a code that indicates the processing status of the BOD. If a processing error occurs, the code helps the administrator determine where the error occurred and troubleshoot the error. Valid values are: 9=ERP Error, 1=Processed without error, 999=Salesforce error, and 0=not processed - awaiting processing.
- If a processing error occurs, the **Error Message** field displays the message associated with the processing issue.
- The **Marked as Processed** field displays a code that indicates whether the message was processed. Valid values are: 1=processed, 0=not processed.
- The **Created By** field displays the owner of the BOD. All outbound messages are created by the Integration user.
- The **Last Modified Date** field displays the date the message was last processed.
- The **Created Date** field displays the date that the message was created.

Viewing outbound transactions in Infor Back Office Connect

Viewing outbound transactions on the Outbound Transactions custom object.

To view outbound transactions in Infor Back Office Connect:

- 1 Login to Salesforce as the Infor Back Office Connect administrator or Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Outbound Transactions** tab.
- 4 Select **All** from the View list and click **Go!** to display the complete list of all outbound transactions.
- 5 View the outbound transaction information.

Viewing the configured BOD message sources

To view the configured BOD message sources:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click [Message Sources](#) to display the Message Sources Home page.
- 5 Select **All** from the View list and click **Go!** to display the configured message sources.
- 6 Click the message source name to display the message source details. The message source details display a list of all available BOD type versions for the configured ERP.

The **Bod Type Version Name** column displays the schema versions of a BOD type. The combination of the BOD type and BOD schema version indicate the supported combination of a BOD verb and a BOD noun.

- 7 In the Messages Source BOD Type Versions list, click the message source BOD type version name to display the message source BOD version details.

Note: BOD type versions are backwards compatible with previous BOD type versions.

- 8 In the Message Source BOD Type Detail section, click the BOD type version hyperlink to display the BOD Type Version Detail page.
The BOD Fields Mapping section displays the BOD field mapping related to the selected BOD type version name. The BOD field mappings indicate which Salesforce object and field must be updated in Salesforce when an inbound message is received.

Viewing outbound confirm BODs

Confirm outbound messages sent from Infor Back Office Connect to ERP on the Outbound Messages custom object.

To view outbound confirm BODs in Infor Back Office Connect:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 Select **All** from the View list and click **Go!** to display theIn the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click Outbound Confirm BODs.
- 5 Select **All** from the View list and click **Go!** to display the complete list of outbound confirm BODs.
- 6 View the outbound confirm BODs.

Optionally, you can use Any BOD to create and customize your own BODs that are not supported by the Infor Back Office Connect standard BODs. See "Infor Back Office Connect customization" on page 73 for additional information on how to customize Infor Back Office Connect to meet your business requirements and "Understanding BODs" on page 257 for information on Infor Back Office Connect BODs.

This chapter describes the tasks you must complete to create any BODs in Infor Back Office Connect.

Note: Using Any BOD is an optional step in the Infor Back Office Connect installation, configuration, and implementation process. If you do not need to use the Any BOD functionality, you can skip this chapter.

Creating Any BODs

Complete these tasks to create Any BODs in Infor Back Office Connect:

- Create a BOD Type for the Sync, Acknowledge, Show, and Process BODs
- Create a BOD Entity Mapping
- Map BOD Type Version
- Create a BOD Field Entity
- Map the BOD Type Version to the Message Source
- Create a custom handler and configure the handler name in the BOD Entity Mapping
- Create a record in the BOD Type Version object for each Any BOD
- View the Sample Process BOD

List of required object fields for any BODs

These object fields are required to support the Any BOD functionality for any new object created in Infor Back Office Connect that will be mapped to use an Any BOD.

Any BOD

Field Name	Field API Name (without namespace)	Field Type	Length
Ext Id	extId__c	TextExternal ID	255
Location Id	locationid__c	Text	255
Ext Logical Id	extlogicalid__c	Text	255
In Sync	insync__c	Checkbox Default=UnChecked	
Can Send BOD	cansendbod__c	Checkbox Default=UnChecked	
Status Code	statuscode__c	Picklist Values: Open, Closed, Deleted, Pending	
Variation Id	variationid__c	Numeric	Length -18 Decimals - 0
Ext Accounting Entity Id	extaccountingentityid__c	Text	255
Ext Record Id	extRecordId__c	Text	255
Message Source	Message_Source__c	Lookup to Message Source object. This field is only required for Out-bound BODs.	

Any BOD reference package

The Any BOD reference package provides a sample Any BOD configuration to use as a guide when configuring Any BOD to conform to your business needs. Throughout this section, the SupplierPartyMaster BOD is used as the sample for configuring both Infor Back Office Connect and ION to support this BOD.

Installing the Any BOD reference package

To install the Any BOD reference package:

- 1 Log in to Salesforce as the system administrator.
- 2 In another browser window or tab, login to the Infor Xtreme Support portal and navigate to the Infor Back Office Connect KB number **1149054**. See "Registering to receive Infor Back Office Connect knowledge base e-mail updates" on page 14.
- 3 Locate the Any BOD Reference Package Installation URL and click the link to begin the Any BOD package installation. The Package Installation Details page is displayed in your Salesforce organization. A summary of the Inforce package you are installing and the changes the package makes to your Salesforce organization are displayed.
- 4 Review the package installation details and click **Continue**.
- 5 In the Any BOD Reference Package page, click **Next**.

- 6 In the Security Level page, specify the **Select Security Settings** option.
- 7 Select **Full Access** for each user profile that requires full access to the Any BOD package. We recommend full access for the Inforce Administrator and the Inforce Developer profiles.
- 8 Click **Next**.
- 9 In the Install Package page, click **Install**. The Install Complete Page is displayed and an email will be sent to the email address of your system administrator user profile.
- 10 Select **Your name > Setup**.
- 11 In the sidebar column, select **App Setup > Installed Packages**.
- 12 In the Installed Packages sections, click the Infor Back Office Connect package name. The Package Details window is displayed.
- 13 Confirm that the Any BOD reference package is installed in your Salesforce organization.

Accessing the Any BOD static references file

The Any BOD reference package installs static references as examples using the SupplierPartyMaster BOD. These static references can be downloaded and modified for your deployment.

To access the Any BOD static references file:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Your name > Setup**.
- 3 In the sidebar column, select **App Setup > Develop > Static Resources**.
- 4 In the Static Resources list, click the [SupplierPartyMasterSeedData](#) hyperlink. The Static Resource Detail window is displayed.
- 5 Click the [View File](#) hyperlink.
- 6 Save the .zip file to your computer.
- 7 Open the .zip file to view the files.

Creating a BOD type for the Sync, Acknowledge, Show, and Process BODs

You must first define the Sync, Acknowledge, Show, and Process BODs to create an Any BOD in Inforce.

To create a BOD Type for Sync and Acknowledge BODs:

- 1 Log in to Inforce as the Inforce developer.
- 2 In the Force.com **App** menu, select **Inforce Administration**.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click [Bod Types](#).
- 5 Click **New**.
- 6 Specify this information:

Bod Type Name

Specify the combination of the BOD Verb and Noun. For example, SyncSupplier.

Verb

Specify Sync as the BOD verb.

Active

Selecting or clearing this check box determines whether the Bod Type is currently active.

Noun

Specify the noun for the data you are publishing. For example, Supplier.

Is Custom

Selecting or clearing this check box determines whether the Bod Type is custom.

Note: You must select this check box for any Any BOD Types you create.

- 7 Click **Save**.
This message is displayed: Any other existing active records for this BOD Type will be deactivated.
- 8 Click **OK**.
- 9 Repeat steps 1 - 8 for these BOD verbs:
 - Acknowledge
 - Process
 - Show

Refer to the Any BOD Static Resources SupplierPartyMasterSeedData.zip for an example.

Creating a BOD entity mapping for an Any BOD

To create a BOD Entity Mapping:

- 1 Login to Salesforce as the Inforce developer.
- 2 In the Force.com **App** menu, select **Inforce Administration**.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click [BOD Entity Mappings](#).
- 5 Click **New**.
- 6 Specify this information:

Bod Entity Mapping Name

Specify the Noun of the BOD.

Bod Type

Specify the BOD Type created for the Process verb when creating a BOD type for the Sync and Acknowledge BODs. See "Creating a BOD type".

BOD Trigger Event

Specify the events that trigger Inforce to publish Outbound BODs to the ERP.

- **Insert:** A BOD is generated when a record is inserted by a user.

- **Update:** A BOD is generated when a record is updated by a user.
- **Delete:** A BOD is generated when a record is deleted by a user.

BOD Trigger Condition

Specify the condition that will be used by Inforce to publish BODs based on the BOD Trigger Event.

Handler Class Name

Specify the name of the handler called by Inforce when a BOD is processed.

Handler Type

Specify when the handler will be called to process BODs.

- **None:** No handler is called.
- **Inbound:** The handler is called for Inbound BODs.
- **Both:** The handler is called for both Inbound and Outbound BODs.
- **Outbound:** The handler is called for Outbound BODs.

Note: To add a Custom Handler: click **App Setup> Develop> Apex Classes> New**.

CRM Entity Name

Specify the API name of the object created for the BOD.

Entity Acronym

Specify a unique 2 character value for this BOD Entity.

Sharable

Select this check box for Inforce to configure the Default Record Owner user as the record owner for all records during data synchronization.

Is Custom

Select this check box for any new BOD Entity Mappings you create. When this option is selected, the Load Seed data will not modify this customized field. Standard records cannot be modified, but can be disabled by clearing the **Active** check box.

Active

Select this check box if the BOD Entity is active.

- 7 Click **Save**. Refer to the Any BOD Static Resources SupplierPartyMasterSeedData.zip for an example. You must add the Salesforce ID for the Process BOD Type defined when creating a BOD type for the Sync and Acknowledge BODs. See "Creating a BOD type for the Sync, Acknowledge, Show, and Process BODs" on page 107.

Mapping the BOD type version

This task controls the version of the BOD Type you created.



Caution: BOD type versions must have different version numbers. If a standard BOD type version is cloned to create an Any BOD type version, Inforce will disable the standard BOD type version.

To map the BOD type version:

- 1 Login to Salesforce as the Inforce developer.
- 2 In the Force.com **App** menu, select **Inforce Administration**.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click Bod Type Versions.
- 5 Click **New**.
- 6 Specify this information:

Bod Type Version Name

The name should include the Verb, Noun, Version ID, and Release ID of the BOD you are mapping. For example, SyncSupplier 9.2-2.8.0.

Bod Type

Specify the BOD Type created during the previous task. Verify that the Verb and Noun match the BOD Type Version you are creating.

Is Custom

Select this check box for any new BOD Entity Mappings you create. When this option is selected, the Load Seed data will not modify this customized field. Standard records cannot be modified, but can be disabled by clearing the **Active** check box.

BOD Version Id

Specify the version ID of the BOD.

BOD Release Id

Specify the release ID of the BOD.

Active

Select this check box if the BOD Type Version is active.

- 7 Click **Save**.
- 8 Repeat steps 1- 7 for each of the BOD Types created in the previous version.
- 9 For the Process BOD Type Version, you must attach the outbound BOD Type Version template. The sample ProcessSupplierMaster 9.2-1.9.0.xml is included in the static resource SupplierPartyMasterSeedData.zip file. See "Modifying a BOD type version template for a Process BOD" on page 91 for information on the process of modifying the BOD Type Version template. Refer to the Any BOD Static Resources SupplierPartyMasterSeedData.zip for an example. You must add the Salesforce ID for the Process BOD Type defined when creating a BOD type for the Sync and Acknowledge BODs. See "Creating a BOD type for the Sync, Acknowledge, Show, and Process BODs" on page 107.

Mapping BOD field mappings for Any BOD

This task maps the Sync BOD Type Version created in a previous step and maps BOD elements to object fields in Inforce. This task instructs Inforce which BOD elements will map to which fields.

To map the BOD Field Mappings:

- 1 Log in to Salesforce as the Inforce Developer.
- 2 In the Force.com App menu, select Inforce Administration.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click **Bod Field Mappings**.
- 5 Click **New**.
- 6 Specify this information:

Bod Field Mapping Name

The unique name for this field mapping.

Bod Type Version

The BOD Type Version ID for the Sync Any BOD created in the Mapping the BOD type version task.

BOD XPath

The XPath in the BOD where this value will be retrieved.

Is Custom

True.

Related Object API Name

CRM Entity Name

The API name of the object Inforce will use.

CRM Attribute Name

The API name of the field of the CRM Entity Name Inforce will map the value to.

Field Type

See "Viewing BOD entity mappings in Infor Back Office Connect" on page 99.

- 7 Click **Save**.
- 8 Repeat steps 5 through 7 for each field. Refer to the Any BOD Static Resources SupplierPartyMasterSeedData.zip for an example. You must add the Salesforce ID for the Process BOD Type defined when creating a BOD type for the Sync and Acknowledge BODs. See "Creating a BOD type for the Sync, Acknowledge, Show, and Process BODs" on page 107.

Mapping the BOD type version to the message source

This task includes the steps you must complete to map the BOD Type Version to the configured Message Source. If you have not configured the Message Source, see "Configuring message source settings for multiple back office integration" on page 144.



Caution: When adding new BOD Type Versions to a Message Source, older BOD Type Versions should be removed from the Message Source BOD Type Version before processing BODs.

To map the BOD Type Version to the Message Source:

- 1 Login to Salesforce as the Inforce developer.
- 2 In the Force.com **App** menu, select **Inforce Administration**.
- 3 Click the plus icon (+) to display all tabs.
- 4 In the All Tabs list, click Message Source BOD Type Versions.
- 5 Click **New**.
- 6 Specify this information:
Bod Type Version
Select the BOD Type Version created during the previous task.
Message Source
Select the Message Source that Inforce will use to publish to the ERP.
- 7 Click **Save**.
- 8 Repeat steps 5 through 7 for each BOD Type Version created and for each Message Source that supports the Any BOD created in the previous tasks.

Adding a message source entity

To add a message source entity:

- 1 Login to Salesforce as the Inforce developer.
- 2 In the Force.com App menu, select **Inforce Administration**.
- 3 Click **Configure Message Source Settings**.
- 4 Click **Edit** for the Message Source to add the Any BOD.
- 5 In the Entity Selection section, select the Any BOD name and click the add icon (>>).
- 6 Click **Save**.
- 7 Repeat steps 4 through 6 for each Message Source adding the Any BOD.

Creating a custom handler and configuring the handler name in the BOD Entity Mapping

Note: To add this handler to other objects you must change the API name "Suppliername__c" to an API name. We recommend a search and replace process.

To create a custom handler:

- 1 Log in to Salesforce as the Inforce developer.
- 2 In the Force.com App menu, select Infor Back Office Connect Administration.
- 3 Select **your name > Setup**.
- 4 Click **App Setup > Develop > Apex Classes > New**.
- 5 In the Apex Class section, copy and paste this script:

```
global with sharing class CustomSupplierPartyMasterHandler extends
InforceEW.PartyMasterHandler implements InforceEW.HandlerInterface
{
    private InforceEW.ReturnResult retResult = new InforceEW.Return
Result();
    private List<Supplier__c> lstExistingSupplier = null;
    private List<Supplier__c> lstSupplier = null;
    private InforceEW.Logger logger = new InforceEW.Logger('Custom
Supplier');
    global void setInboundMessage(InforceEW.InboundMessage inbound
Message){
        this.message = inboundMessage;
    }

    global String getExtraFields(){
        return '';
    }
    global InforceEW.ReturnResult handleOutboundMsg(InforceEW.Outbound
Message messageOB) {

        super.handleOutbound(messageOB);

        List<SObject> sObj = getSObjectFromTemplateObj(messageOB);

        messageOB.ionDataObj = getIONObjFromTemplateObj( messageOB.
principalObjName , messageOB.ionTemplateObj , sObj[0] );

        /**
         * translate the mappings for the principal object now.
         */
        translateTemplateXML(messageOB);

        retResult.put('isProcessed', false);

        return retResult;
    }

    global InforceEW.ReturnResult handleInboundMsg(InforceEW.Return
Result returnResult, String verbName)
    {
        logger.log(InforceEW.LoggerConstants.ComponentCategory.Inbound_
Handler,' Start handleInboundMsg.....');

        if(verbName.equalsIgnoreCase('Sync') || verbName.equalsIgnore
```

```
Case('Show'))
{
    handleSyncSupplierPartyMaster(returnResult);
}
else if(verbName.equalsIgnoreCase('Acknowledge'))
{
    handleAckSupplierPartyMaster();
}
else
    throw new InforceEW.InvalidBODException('Unsupported BOD');
logger.log(InforceEW.LoggerConstants.ComponentCategory.Inbound_
Handler,' End handleInboundMsg.....');
return retResult;

}

private void handleSyncSupplierPartyMaster(InforceEW.ReturnResult
retRes)
{
    logger.log(InforceEW.LoggerConstants.ComponentCategory.Inbound_
Handler,' Start handleSyncSupplierPartyMaster.....');
    String supplierSFID = null;
    Set<String> setExtIdAcctngIdComb = (Set<String>)retRes.get
('uniqueKeys');
    lstExistingSupplier = (List<Supplier__c>)retRes.get( 'existing
Records' );

    if(!isAckBodReceived(message,lstExistingSupplier,Boolean.value
Of(retRes.get('hasNewRecord'))
    && lstExistingSupplier != null && lstExistingSupplier.size
() > 0)
    {
        retResult.put('entity', lstExistingSupplier[0]);
        retResult.put('isProcessed', false);
        return;
    }
    lstSupplier = (List<Supplier__c>)retRes.get( 'newRecords' );

/**
 * Checking the status code.
 * If status tag is missing from the BOD.
 */
for(Supplier__c newSupplier : lstSupplier){

    if(newSupplier.statuscode__c == null)
    {
        newSupplier.statuscode__c = '';
    }
}

/**
 * No need to process anything if the status code is Deleted,
```

```

just delete the bill to master and exit          *
    */
    String StatusCodeVal = String.valueOf(lstSupplier[0].get
('statusCode__c'));
    if (StatusCodeVal.equalsIgnoreCase('Deleted'))
    {
        if(lstExistingSupplier != null && lstSupplier != null &&
lstExistingSupplier.size() == lstSupplier.size())
        {
            List<Supplier__c> lstSupplierDelete = new List
<Supplier__c>();
            /**
            * Deleting Supplier records which are not already
deleted
            */
            for(Supplier__c supplier: lstExistingSupplier){
                if( !supplier.isdeleted){
                    lstSupplierDelete.add(supplier);
                }
            }
            if(lstSupplierDelete.size() > 0){
                delete lstSupplierDelete;
                emptyRecycleBin(lstSupplierDelete);
            }
            retResult.put( 'isProcessed' , true);
            return;
        }
        else
        {
            throw new InforceEW.InvalidBODException('Supplier
party does not exist in Inforce.' + ' ' + 'ExtId -' + String.valueOf
(lstSupplier[0].extid__c));
        }
    }
    else
    {
        if (validate())
        {
            setInSyncCanSend(lstSupplier, true, true);
            List<Supplier__c> lstSupplierNew = new List<Supplier__
c>();
            for(Supplier__c supplier: lstSupplier){
                lstSupplierNew.add((Supplier__c)supplier);
            }
            logger.log(InforceEW.LoggerConstants.ComponentCategory.
Inbound_Handler, ' CSPM:116.....lstSupplierNew entity.....'+lst
SupplierNew[0]);
            InforceEW.SFIONIntegration.isGenerateExtId = true;
            upsert lstSupplierNew extid__c;
            logger.log(InforceEW.LoggerConstants.ComponentCategory.
Inbound_Handler, ' CSPM:119.....lstSupplierNew entity.....'+lst

```

```
SupplierNew[0]);
        retResult.put( 'entity' , lstSupplier[0]);
        retResult.put( 'isProcessed' , true);
        return;
    }
}
retResult.put( 'isProcessed' , false);
logger.log(InforceEW.LoggerConstants.ComponentCategory.
Inbound_Handler, ' End handleSyncSupplierPartyMaster.....');
}

private boolean validate(){
    for(Supplier__c supplier: lstSupplier){

        if (supplier.addressline__c == null && supplier.
addressline__c == ''){
            throw new InforceEW.InvalidBODException('Address Line
Missing in Supplier Party Master BOD');
            return false;
        }
    }
    return true;
}

/**
 * Method to handle acknowledgeSupplierPartyMaster BOD
 * @param
 *
 * @return
 * void
 */
public void handleAckSupplierPartyMaster()
{
    logger.log(InforceEW.LoggerConstants.ComponentCategory.
Inbound_Handler, ' Start handleAckSupplierPartyMaster.....');

    Supplier__c entity = (Supplier__c)handleAcknowledgeParty
Master('Supplier__c');

    if(message.getActionCode().equals( 'Accepted' ) &&
(Boolean.Valueof(entity.get('isDeleted'))))
    {
        retResult.put( 'isProcessed' , true);
        return;
    }
    else if(entity != null)
    {
        update entity;
    }
    retResult.put( 'entity' , entity);
}
```

```

        retResult.put( 'isProcessed' , true);
        logger.log(InforceEW.LoggerConstants.ComponentCategory.
Inbound_Handler,' End handleAckSupplierPartyMaster.....');
    }
    /***** Extra method
writtern*****/

    private void emptyRecycleBin(List<SObject> entitylst){
        /**
        * Method to delete record from recycle bin
        */
        if (entitylst != null && entitylst.size() > 0) {
            Integer dmlLimit = Limits.getLimitDMLRows() - Limits.get
DMLRows();
            /**
            * Avoid hitting governor limit by checking available dml
limits
            * We can empty 200 records at a time form recycle bin
            */
            if(dmlLimit > 200){
                dmlLimit = 200;
            }
            List<SObject> lstToDelete = new List<SObject>();

            if(entitylst.size() > dmlLimit){
                for(integer i =0 ;i<dmlLimit;i++){
                    lstToDelete.add(entitylst[i]);
                }
            }else{
                lstToDelete = entitylst;
            }
            List<Database.EmptyRecycleBinResult> deletedRecord=
Database.emptyRecycleBin(lstToDelete);
        }

    }
}

```

6 Click **Save**. Refer to the SupplierMasterHandler in the Apex Classes as an example.

Creating a sample any BOD trigger

Note: This sample is for the Supplier Party Master BOD. To add this trigger to other objects you must change the trigger name "supplier__c" to the desired custom object name. We recommend a search and replace process.

To create a sample any BOD trigger:

1 Log in to Salesforce as the Inforce developer.

- 2 In the Force.com **App** menu, select **Inforce Administration**.
- 3 Select **Your name > Setup**.
- 4 In the sidebar column, select **App Setup > Create > Objects**.
- 5 Select a custom object.
- 6 In the Triggers section, click **New**.
- 7 In the Apex Trigger section, copy and paste this script:

```
trigger SupplierCRUD on Supplier__c (after insert, after Update) {  
    if(trigger.isInsert || trigger.isUpdate){  
        List<String> lstSupplierId = new List<String>();  
        for(supplier__c supplier : trigger.new){  
            lstSupplierId.add (supplier.id);  
        }  
        System.debug(LoggingLevel.DEBUG, 'Supplier Created' + lst  
SupplierId.size());  
        /**  
        * insert record in transaction object  
        */  
        if(lstSupplierId.size()>0){  
            System.debug(LoggingLevel.DEBUG, 'Supplier Created' + lst  
SupplierId.size());  
            InforceEW.IonTxnUtility.conditionalInsertIonTxn(lst  
SupplierId,'Supplier__c', trigger.isInsert, trigger.isUpdate, trigger.  
isDelete);  
            System.debug(LoggingLevel.DEBUG, 'Transaction Created');  
        }  
    }  
}
```

- 8 Click **Save**. Refer to the trigger for the Supplier custom object as an example.

Multi-company installation and configuration

7

An ERP's multi-company functionality enables the grouping of business operations recorded in ERP into one or many discrete groupings called financial entities. In Infor Back Office Connect, the Multi-company Reference Package provides the ability to manage data by organizing enterprise operations into multiple financial entities. The Multi-company Reference Package supports the segmentation and consolidation of all master data and operational transactions that result from the activities in the enterprise and link to each financial company.

Optionally, you can install and configure the Multi-company Reference Package to create a simple deployment and complex deployment option that allow for configurations based on specific security business requirements. The simple deployment uses two accounting entities and the complex deployment uses a role hierarchy based on accounting entities.

Note: Infor Back Office Connect remains a managed package. The Multi-company Reference Package is an additional un-managed package that supports installation-specific customization.

When the Multi-company Reference Package is installed and configured, Infor Back Office Connect manages the new unique IDs to publish BODs to the proper ERP accounting entity. A sample trigger to set ownership of new records based on accounting entity ID and location ID must be configured by the system administrator in the Accounting Entity Table (AET). This leverages the existence of role hierarchies and sharing rules already deployed in your organization

Note: Installing and configuring the Multi-company Reference Package is an optional step in the Infor Back Office Connect installation, configuration, and implementation process. If you do not need to implement Infor Back Office Connect using a multi-company deployment, you can skip this chapter.

Installing the multi-company reference package

To install the Multi-company Reference Package:

- 1 Log in to Salesforce as the system administrator.
- 2 Login to the Infor Xtreme Support portal and navigate to the Infor Back Office Connect KB 1149054.
- 3 Locate the Reference Package Installation URL and click the link to begin the multi-company package installation. The Installation Details page is displayed in your Salesforce organization. This page

displays a summary of the Infor Back Office Connect package you are installing and the changes the package will make to your Salesforce organization.

- 4 Review the package installation details and click **Continue**.
- 5 In the Multi-company Reference Package page, click **Next**.
- 6 In the Security Level page, specify the **Select Security Settings** option.
- 7 Select **Full Access** for each user profile that require full access to the multi-company package. We recommend full access for the Infor Back Office Connect Administrator and the Infor Back Office Connect Developer profiles.
- 8 Click **Next**.
- 9 In the Install Package page, click **Install**. The Install Complete Page will display and an email will be sent to the email address of your system administrator user profile.
- 10 Select **Setup > App Setup > Installed Packages**.
- 11 Confirm the Multi-company Reference Package is installed in your Salesforce organization.

Understanding accounting entity mapping

Accounting Entity Mapping is used to relate the record owner based on Accounting Entity ID or Accounting Entity ID and Location ID. Accounting Entity Mapping is a configurable table maintained by the system administrator to support the sample trigger that assigns the owner of a new record. Accounting Entity Mapping is part of the multi-company reference package deliverable with the Sample Trigger.

Name	Type	Length	Values	Default Value	Required
Accounting Entity ID	Text	255			Yes
Location ID	Text	255			No
Owner	User		User	Group	Yes

These are the fields included in the Accounting Entity Mapping:

Accounting Entity ID

An Accounting Entity ID relates a single user to an Accounting Entity and should always have a value. The Location ID may be blank for one record for the Master BODs to use to assign the record owner when they are received by Infor Back Office Connect from the ERP.

Location ID

A Location ID relates a single user to an Accounting Entity and Accounting Entity. This field should only be used when a deployment requires that the Accounting Entity be divided by Locations. There should only be a single combination of the Accounting Entity ID and Location ID in the table as it assigns the record owner for transactional BODs when they are received by Infor Back Office Connect from the ERP.

Owner

This is the value used by the sample trigger to assign the owner of a new record when a ERP is received by Infor Back Office Connect from the ERP. The owner must be a username for the organization.

Depending on your business requirements, you may you have an organization that has only a few or many accounting entities. These tables show how to create the mapping for Master and Transactional Data for simple and complex deployment scenarios.

Note: Master Data only requires an Accounting Entity while Transactional Data requires an Accounting Entity and Location ID as both are defined in the BODs that are published to Infor Back Office Connect.

This table shows a simple deployment scenario:

Accounting Entity ID	Location ID	Owner
ID #1		Salesperson A
ID #2		Salesperson B

This table shows a complex deployment scenario:

Accounting Entity ID	Location ID	Owner
Customer #1		Salesperson A
Customer #2		Salesperson B
Customer #3		Salesperson C
Customer #4	ATL	Salesperson D
Customer #4	NYC	Salesperson E

Navigating the accounting entity table

To navigate the Accounting Entity Table:

- 1 Click the plus icon (+) to display all tabs.
- 2 Click **Accounting Entity Tables**.
- 3 Click **Go**.
- 4 Click the button for the action you want to complete:

New Accounting Entity

To create a new accounting entity.

Edit

To edit an accounting entity.

Delete

To delete an accounting entity.

Choosing a deployment scenario

Prior to choosing a deployment scenario, ensure that Infor Back Office Connect is installed and properly configured with all required message sources, ION is installed and configured for each of the message sources, and the Multi-company Reference Package is installed.

To choose a deployment scenario:

- 1 Create a layout of your Accounting Entity structure.
- 2 Define your security model by determining your users' access needs.
- 3 Ask yourself these questions:
 - **Do you have more than 1 Accounting Entity?**
No: No trigger or AET is required.
Yes: Continue with the next question.
 - **Do all users need to view all of the data?**
Yes: No trigger or AET is required.
No: Continue with the next question.
 - **Do you use a role hierarchy today?**
Yes: Use the complex deployment scenario.
No: Continue with the next question.
 - **Do most users need to view one Accounting Entity's data?**
Yes: Use the simple deployment scenario.
No: Use the complex deployment scenario.

Note: These are suggested recommendations. For assistance with determining your deployment scenario, contact the Infor ICS team.

Creating a public group

Public groups allow users in the same group to share record information as determined by a sharing rule. You must create a public group prior to creating a sharing rule.

To create a public group:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Manage Users > Public Groups**.
- 4 Click **New**.
- 5 Specify a **Label**.
- 6 In the Search drop-down-list, select **Users**.
- 7 In the Available Members list, select the users and **Add** them to the Selected Members list.
- 8 Click **Save**.
- 9 Repeat these steps for every group you create.

Understanding the sample trigger

The sample trigger is designed to change the ownership of a record after it is imported from the ERP into Infor Back Office Connect. This sample trigger allows deployments to use their existing security models.

Adding the standard objects sample trigger to Infor Back Office Connect

Note: To add this trigger to other objects you must change the trigger name "ContactInsert" and the object name "Contact". We recommend a search and replace process.

To add the standard objects sample trigger to Infor Back Office Connect:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Contact > Triggers**.
- 4 Click **New**.
- 5 In the Apex Trigger section, copy and paste this script:

```
trigger ContactInsert on Contact (before insert) {
    Map<String,String> mapAEIdOwner = new Map<String,String>();
    set<String> setCompositeKey = new set<String>();
    String locationIdApiName = "";
    String entityName= string.valueOf(Trigger.New[0].getObjecttype());

    if(InforceEW.IonTxnUtility.checkIntegrationUser()){
    /**
    * Step1: Create Composite Key which will be combination of AEID and
    LocId.
```

```
*/
for(SObject obj: Trigger.New)
{
    if(obj.get(*InforceEW__extaccountingentityid__c') != null){
        if(obj.get('InforceEW__locationid__c') != null){
            setCompositeKey.add(obj.get('InforceEW__extaccountingentityid__
c') + ':' +
obj.get('InforceEW__locationid__c'));}

            else{

setCompositeKey.add(string.valueOf(obj.get('InforceEW__
extaccountingentityid__c')));

                }
            }
        else{
            setCompositeKey.add("");
        }
    }
}
/**
* Step2: Query to retrieve records from AET table based on composite
Key.
*/

if(setCompositeKey.size() > 0){

    List<accountingEntityTable__c> lstAcccEntity = [select
id.accountingEntityID__c,owner__c, locationID__c, compositeKey__c
from
accountingEntityTable__c where compositeKey__c in : setCompositeKey];

    if(lstAcccEntity != null && lstAcccEntity.size() >0){

        for(accountingEntityTable__c accEntity: lstAcccEntity){

            mapAElDOwner.put(accEntity.compositeKey__c,accEntity.
owner__c);

        }
    }
}
/**
* Step3: Assigning default user from AET table as the owner of
the record.
*/
for(SObject objNew: Trigger.New){
    String compKey = null;
    if (objNew.get('InforceEW__location__c') !=null{

        compKey = objNew.get('InforceEW__extaccountingentityid__
c') + '.' +
objNew.get('InforceEW__locationid__c');
```



```
if(InforceEW.IonTxnUtility.checkIntegrationUser()){
/**
* Step1: Create Composite Key which will be combination of AEID and
LocId.
*/
for(SObject obj: Trigger.New)
{
    if(obj.get(*InforceEW__extaccountingentityid__c') != null){
        if(obj.get('InforceEW__locationid__c') != null){
            setCompositeKey.add(obj.get('InforceEW__extaccountingentityid__
c') + ':' +
obj.get('InforceEW__locationid__c'));}

            else{

setCompositeKey.add(string.valueOf(obj.get('InforceEW__
extaccountingentityid__c')));

        }
    }
    else{
        setCompositeKey.add("");
    }
}

/**
* Step2: Query to retrieve records from AET table based on composite
Key.
*/

if(setCompositeKey.size() > 0){

    List<accountingEntityTable__c> lstAcccEntity = [select
id.accountingEntityID__c,owner__c, locationID__c, compositeKey__c
from
accountingEntityTable__c where compositeKey__c in : setCompositeKey];

    if(lstAcccEntity != null && lstAcccEntity.size() >0){

        for(accountingEntityTable__c accEntity: lstAcccEntity){

            mapAEldOwner.put(accEntity.compositeKey__c,accEntity.
owner__c);

        }
    }
/**
* Step3: Assigning default user from AET table as the owner of
the record.
*/
for(SObject objNew: Trigger.New){
```


Creating a sharing rule for a simple deployment scenario

Your security requirements will determine whether your organization allows sharing of records based on user groups.

To create a sharing rule:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Security Controls > Sharing Settings**.
- 4 In the Account Sharing Rules section, click **New**.
- 5 Specify the **Label**.
- 6 Select the **Rule Type: Based on record owner** option.
- 7 In the **Account: owned by members of** drop-down-list boxes, select **Public Groups** and specify the group.
- 8 In the **Share with:** drop-down-list boxes, specify **Public Groups** and specify the group.
- 9 Set these drop-down-list boxes to **Read Only**:
 - **Default Account, Contract and Asset Access**
 - **Opportunity Access**
 - **Case Access**
- 10 Click **Save**.
- 11 Repeat these steps for each group that you created.

Creating a sharing rule for a complex deployment scenario

Your security requirements will determine whether your organization allows sharing of records based on user groups.

To create a sharing rule:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Security Controls > Sharing Settings**.
- 4 In the Account Sharing Rules section, click **New**.
- 5 Specify the **Label**.
- 6 Select the **Rule Type: Based on record owner** option.
- 7 In the **Account: owned by members of** drop-down-list boxes, select **Roles** and specify the role.
- 8 In the **Share with:** drop-down-list boxes, select **Roles and Subordinates** and specify the role.

- 9 Set these drop-down-list boxes to **Read Only**:
- **Default Account, Contract and Asset Access**
 - **Opportunity Access**
 - **Case Access**

10 Click **Save**.

11 Repeat these steps for each role that you created.

Setting objects to private for a simple or complex deployment scenario

Depending on your business requirements, objects can be set to Private in the Sharing Settings window. We recommend that these objects be set to private: Account, Contract and Asset, Address, Bill-to, Lookup Category, Pay-from, Ship-to, Shipment, and Territory.

To set objects to private:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Security Controls > Sharing Settings**.
- 4 Click **Edit**.
- 5 In the Default Access list, set these objects to Private:
 - **Default Account, Contract, and Asset**
 - **Address**
 - **Bill-to**
 - **Lookup Category**
 - **Pay-from**
 - **Ship-to**
 - **Shipment**
 - **Territory**
- 6 Click **Save**.

Assigning a role hierarchy

Role hierarchy assignments provide access to opportunities and cases associated with an account. Role hierarchy is determined by your business requirements.

To assign role hierarchy:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Manage Users > Roles**.
- 4 Click **Add Role**.
- 5 Specify the information you desire for each account entity or location ID that you have mapped.
- 6 Click **Save**.
- 7 Repeat these steps for each role that you created.

Understanding the unique ID

The Unique ID is a globally unique value that is assigned to a BOD instance. In addition to supporting customer any BODs, Infor Back Office Connect supports these 13 Master Data and Transactional BODs. See "Creating Any BODs" on page 105.

Note: All BODs require a Unique ID in the list of required fields for Any BODs.

Master Data BODs	Transactional BODs
BillToPartyMaster (two-way)	Customer Return
CodeDefinition (two-way)	Invoice
ContactMaster (two-way)	Quote
CustomerPartyMaster (two-way)	Receivable Transaction
ItemMaster	Sales Order
PayFromPartyMaster (two-way)	Shipment
ShipToPartyMaster (two-way)	

This is an example of the Unique ID of a Master Data BOD:

CustomerPartyMaster (Account):

Customer ID = C00001

Accounting Entity = 45WD

Unique ID = 45WD:C00001

This is an example of the Unique ID of a Transactional BOD:

Invoice:

Invoice ID = INV00231

Accounting Entity = 45WD

Location ID = 1

Unique ID = 45WD:1:INV00231

Note: In this example, if the Location ID of the Transactional BOD was null, the Unique ID would be reflected as 45WD::INV00231.

Modifying the Infor Back Office Connect page layout to add the message source lookup

These Infor Back Office Connect Page Layouts must be modified to use the Master Source Lookup: Infor Back Office Connect Account Layout, Infor Back Office Connect Bill-To Layout, Infor Back Office Connect Contact Layout, Infor Back Office Connect Pay-From Layout, Infor Back Office Connect Ship-To Layout, and Infor Back Office Connect Territory Layout.



Caution: The page layout modifications described in this section are only required for customers who are upgrading Infor Back Office Connect from version 10.6.x to version 10.8.x. If you are installing Infor Back Office Connect version 10.8.x, you do not have to complete this additional configuration.

To modify an Infor Back Office Connect page layout to add the Message Source Lookup:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Customize > Accounts > Page Layouts**.
- 5 Select the Infor Back Office Connect Account Layout and click **Edit**.
- 6 In the Infor Back Office Connect Account Layout window, click and drag the Message Source field into the Account Sample section.
- 7 Click **Save**.
- 8 Repeat Steps 5 through 7 for the Infor Back Office Connect Contact Layout.
- 9 In the sidebar column, select **App Setup > Create > Objects > Bill-to > Page Layouts**.
- 10 Click **Edit**.
- 11 In the Infor Back Office Connect Bill-to Layout window, click and drag the Message Source field into the Account Sample section.
- 12 Click **Save**.
- 13 Repeat Steps 9 through 12 for the Ship To, Territory, and Pay From Page Layouts.

Adding the user default message source to the user page layout

If there is only one message source, the Default Message Source field can be deleted from all page layouts if the message source field has been completed by the administrator.

To add the User Default Message Source to the User Page Layout:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **Manage Users > Users**.
- 5 Select the user and click **Edit Layout**.
- 6 In the User Layout window, click and drag the **Default Message Source** field to the Additional Information section.
- 7 Click **Save**.

Configuring the default message sources for users

Configuring the default message sources for users in a multi-company environment is a three-step process. To complete this part of the multi-company configuration, you must:

- Determine which message sources are required for your users
- Configure a pick list to define all the default message sources that are available to your users
- Set the default message sources for all users

See the appropriate section for detailed instructions on how to complete these tasks.

Determining the required message sources for users

View the list of available default message sources to determine which message sources are required for your users. The required message sources must then be configured as a pick list to make those message sources available to the required users.

To determine the required message sources for users:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 Click the **Integration Setup** tab.
- 5 Click [Step 3: Configure Message Source Settings](#).

- 6 View the list of available message sources in the Message Sources list. Make a note of the message sources that are required for your users.

Creating the default message source pick list values

After determining which default message sources are required for your users, create a pick list of these required message sources for the **Default Message Source** custom field to make them available for the users.

To create the default message source pick list values:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Customize > Users > Fields**.
- 5 In the User Custom Fields section, click the [Default Message Source](#).
- 6 In the Picklist Values section, click **New**.
- 7 In the Default Message Source pick list window, add the required pick list values.

Note: Verify that the pick list value(s) are the same as the message source names on the Integration Setup page.

- 8 Click **Save**.

Setting the default message source for a user

After creating the pick list of default message source values, configure each user record with a default back office. The specified default message source for the user will be the default message source for the user on all Infor Back Office Connect objects.

To set the default message source for a user:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **Manage Users > Users**.
- 5 Select a user and click **Edit**.
- 6 In the Additional Information section, select the default message source for the user from the **Default Message Source** list.

Note: If the **Default Message Source** field has not been added to the page layout, click **Edit Layout** and drag the **Default Message Source** field to the Additional Information section.

- 7 Click **Save**.

Adding the lookup filter to a lookup object to include message source

In Infor Back Office Connect, there are Lookup Categories and Lookups to support ERP published Code Definitions. To ensure that users select the appropriate values, you will need to add a filter to the field to include the Message Source.

This example shows how to add Geographic Areas as a Lookup to a Contact.

To add the Lookup filter to a Lookup object to include Message Source:

- 1 Log in to Salesforce as the Infor Back Office Connect user.
- 2 In your Infor Back Office Connect user menu, click **Setup**.
- 3 In the sidebar column, select, **App Setup > Customize > Contacts > Fields**.
Note: For Custom Objects, select **App Setup > Create > Objects**.
- 4 Click **New**.
- 5 In the Data Type list, select the **Lookup Relationship** option.
- 6 Click **Next**.
- 7 In the Related to pull-down list, select **Lookup**.
- 8 Click **Next**.
- 9 In the Field Label field, specify Geographic Areas.
- 10 In the Lookup Filter section, select **Show Filter Settings**.
- 11 In the Filter Criteria section, click the Field Lookup icon.
- 12 In the Insert Field window, specify the **Lookup > Lookup Category > Name** options.
- 13 Click **Insert**.
- 14 In the Operator pull-down list, specify **equals**.
- 15 In the Value/Field pull-down list, specify **Value** then **Geographic Areas**.
- 16 Click the AND field Lookup icon.
- 17 In the Insert Field window, specify the **Lookup > Message Source** options.
- 18 In the Operator pull-down list, specify **equals**.
- 19 Click **Insert**.
- 20 In the Operator pull-down list, specify **equals**.
- 21 In the Value/Field pull-down list, specify **Field** then the **Contact > Message Source** options.
- 22 Click **Insert**.
- 23 Click **Next**.
- 24 Click **Next**.
- 25 Click **Next**.
- 26 Click **Save**.

Note: The user must select the Message Source field in the record before selecting a Lookup value.

Adding fields to the search layouts for the account and contact objects

To add fields to the search layout for the account and contact objects:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Customize > Accounts > Search Layouts**.
- 5 Select the Infor Back Office Connect Search Layout and click **Edit**.
- 6 In the Available Fields section, add these fields to each of the account search layouts:

Search Results

Account Name, Account Owner Alias, Account Record Type, Account Site, Accounting Entity ID, Phone, and Type.

Lookup Dialogs

Account Name, Account Owner Alias, Account Site, Accounting Entity ID, Message Source, and Type.

Lookup Phone Dialogs

Account Name, Account Owner Alias, Account Site, Accounting Entity ID, Phone, Other Phone, and Type.

Tab

Account Name, Accounting Entity ID, Billing City, and Phone.

Search Filter Fields

Account Name, Accounting Entity ID, Billing City, and Phone.

- 7 In the sidebar column, select **App Setup > Customize > Contacts > Search Layouts**.
- 8 Select the Infor Back Office Connect Search Layout and click **Edit**.
- 9 In the Available Fields section, add these fields to each of these contact search layouts:

Search Results

Account Name, Account Record Type, Account Site, Accounting Entity ID, Contact Owner Alias, Email, Name, and Phone.

Lookup Dialogs

Account ID, Account Name, Account Site, Accounting Entity ID, Message Source, and Name.

Lookup Phone Dialogs

Account Name, Account Site, Accounting Entity ID, Asst. Phone, Home Phone, Name, Mobile, Mobile Office, Other Phone, and Phone.

Tab

Account Name, Accounting Entity ID, Name, and Phone.

Search Filter Fields

Account Name, Accounting Entity ID, First Name, Last Name, and Phone.

- 10 Click **Save**.

Filtering standard field lookups for message sources

If your deployment uses multiple message sources, filters on lookups are recommended to ensure that users do not select records from a different message source. This table shows the recommended filters to add to the **Parent Account**, **Account**, and **Reports To** fields.

Object	Field	Filter Criteria Field	Operator	Value/Field	Compare Field
Account	Parent Account	Account: Back Office	equals	Field	Account Name: Message Source
Contact	Account	Contact: Back Office	equals	Field	Contact Name: Message Source
Contact	Reports To	Contact: Back Office	equals	Field	Contact Name: Message Source

Adding a filter to standard field objects

To add a filter to a standard field object:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In your Infor Back Office Connect user menu, click **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Accounts > Fields**.
Note: For Contacts, select **App Setup > Customize > Contacts > Fields**.
- 4 In the Account Standard Fields section, select **Parent Account**.
- 5 Click **Edit**.
- 6 In the Lookup Filter section, select **Show Filter Settings**.
- 7 In the Filter Criteria section, click the Field Lookup icon.
- 8 In the Insert Field window, specify the **Account > Message Source** options.
- 9 Click **Insert**.
- 10 In the Operator drop-down list, specify **equals**.
- 11 In the Value/Field drop-down list, specify **Field** then the **Account > Message Source** options.
- 12 In the Filter Type section, specify either the **Required** or **Optional** option.
- 13 Select the **Active** check box.
- 14 Click **Save**.

Note: When you create a Bill-to from an Account, the Message Source and the Accounting Entities are copied.

Adding multi-company validation rules to lookups (optional)

Validation rules must be added to any custom object with a Lookup to a Lookup object to support multi-company data validation. These validation rules will display the error message on the field listed with each message.

This table matches validation rules to the Message Source.

Object	Field Name	Rule Name	Error Message	Error Condition Formula
Account	Area	AreaTypeMessage SourceValidation	The Area Type selected does not have the same Back Office as this Account.	AND (NOT(ISBLANK (InforceEW__Message_Source__c)), (InforceEW__Message_Source__c <> InforceEW__areaid__r.InforceEW__Message_Source__c), NOT(ISBLANK (InforceEW__areaid__r.InforceEW__Message_Source__c)))
Account	Customer Type	CustomerTypeMessage SourceValidation	The Customer Type selected does not have the same Back Office as this Account.	AND (NOT(ISBLANK (InforceEW__Message_Source__c)), (InforceEW__Message_Source__c <> InforceEW__customertypeid__r.InforceEW__Message_Source__c), NOT(ISBLANK (InforceEW__customertypeid__r.InforceEW__Message_Source__c)))
Account	Market	MarketTypeMessage SourceValidation	The Market selected does not have the same Back Office as this Account.	AND (NOT(ISBLANK (InforceEW__Message_Source__c)), (InforceEW__Message_Source__c <> InforceEW__marketid__r.InforceEW__Message_Source__c), NOT(ISBLANK (InforceEW__marketid__r.InforceEW__Message_Source__c)))
Account	Payment Term	PaymentTermMessage SourceValidation	The Payment Term selected does not have the same Back Office as this Account.	AND (NOT(ISBLANK (InforceEW__Message_Source__c)), (InforceEW__Message_Source__c <> InforceEW__paymenttermid__r.InforceEW__Message_Source__c), NOT(ISBLANK (InforceEW__paymenttermid__r.InforceEW__Message_Source__c)))
Account	NAICS	NAICSMessage SourceValidation	The NAICS selected does	AND (NOT(ISBLANK (InforceEW__Message_Source__c)),

Object	Field Name	Rule Name	Error Message	Error Condition Formula
			not have the same Back Office as this Account.	(InforceEW__Message_Source__c <> InforceEW__naicsid__r.InforceEW__Message_Source__c), NOT(ISBLANK (InforceEW__naicsid__r.InforceEW__Message_Source__c)))
Account	Territory	TerritoryMessage SourceValidation	The Territory selected does not have the same Back Office as this Account.	AND (NOT(ISBLANK (InforceEW__Message_Source__c)), (InforceEW__Message_Source__c <> InforceEW__territory__r.InforceEW__Message_Source__c), NOT(ISBLANK (InforceEW__territory__r.InforceEW__Message_Source__c)))
Account	Industry	IndustryMessage SourceValidation	The Industry selected does not have the same Back Office as this Account.	AND (NOT(ISBLANK (InforceEW__Message_Source__c)), (InforceEW__Message_Source__c <> InforceEW__industryid__r.InforceEW__Message_Source__c), NOT(ISBLANK (InforceEW__industryid__r.InforceEW__Message_Source__c)))
Account	Ship Address Price Group	ShipAddress PriceGroup MessageSource Validation	The Ship Address Price Group selected does not have the same Back Office as this Account.	AND (NOT(ISBLANK (InforceEW__Message_Source__c)), (InforceEW__Message_Source__c <> InforceEW__shipadrpricegroupid__r.InforceEW__Message_Source__c), NOT(ISBLANK (InforceEW__shipadrpricegroupid__r.InforceEW__Message_Source__c)))
Account	SIC Code	SICCodeMessage SourceValidation	The SIC Code selected does not have the same Back Office as this Account.	AND (NOT(ISBLANK (InforceEW__Message_Source__c)), (InforceEW__Message_Source__c <> InforceEW__SICCode__r.InforceEW__Message_Source__c), NOT(ISBLANK (InforceEW__SICCode__r.InforceEW__Message_Source__c)))

This table shows the validation rules of a Message Source specific deployment.

Object	Field Name	Rule Name	Error Message	Error Condition Formula
Account	Market	MarketTypeMessage SourceValidation	The Market selected does not have the same Back Office as this Account.	AND (NOT(ISBLANK (InforceEW__Message_Source__c)), (InforceEW__Message_Source__c <> InforceEW__marketid__r.InforceEW__Message_Source__c), NOT(ISBLANK (InforceEW__marketid__r.InforceEW__Message_Source__c)))

Note: The validation rules for accounting entities can be disabled if your deployment requires records that are shared between accounting entities. For example, an account is in Accounting Entity Customer #1 and the Infor Back Office Connect Order is in Accounting Entity Customer #2 (published by ERP.)

Note: If your ERP does not support shared records between accounting entities, see "Setting validation rules for ERPs that do not support shared records between accounting entities" on page 140.

Setting validation rules for a lookup

To set validation rules for a lookup:

- 1 Log in to Salesforce as the Infor Back Office Connect system administrator.
- 2 In your Infor Back Office Connect user menu, click **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Accounts > Validation Rules**.
- 4 Click **New**.
- 5 In the Validation Rule Edit section, specify this information:
 - Rule Name
 - Error Condition Formula
 - Error Message
- 6 Select the Error Location **Field** option.
- 7 Click **Save**.
- 8 Repeat Steps 4 through 7 for each field.

Note: See "Adding multi-company validation rules to lookups (optional)" on page 137.

Note: We recommended that you add Validation Rules to all lookup fields based on your deployment requirements.

Setting validation rules for ERPs that do not support shared records between accounting entities

To set validation rules for ERPs that do not support shared records between accounting entities:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In your Infor Back Office Connect user menu, click **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Accounts > Validation Rules**.
- 4 Select the **ParentAccountAccountEntityvalidation** rule.
- 5 Click **Edit**.
- 6 In the Validation Rule Edit section, select the **Active** checkbox.
- 7 Click **Save**.
- 8 Repeat Steps 4 through 7 for the ContactAccountAccountEntityValidation rule.

Optionally, you can configure the Infor Back Office Connect multiple back office functionality. The multiple back office configuration enables Infor Back Office Connect to connect to multiple ERPs. This is accomplished by leveraging ION's Content Based Routing functionality which is based on Accounting Entity to determine where BODs are sent. For example, Infor Back Office Connect can be connected to an A+ ERP and a LN ERP simultaneously.



Caution: The multiple back office configuration is an optional part of the Infor Back Office Connect installation, configuration, and implementation process. If you do not need to configure multiple back office functionality for your Infor Back Office Connect implementation, you can skip this chapter. Connection Points for each Back Office Logical ID and Infor Back Office Connect need to be configured before starting these instructions.

Multiple back office configuration tasks

Complete these tasks to configure ION for multiple back office:

- Create a document flow for each BOD Noun and ERP
- Add an application to an activity
- Add documents to the activities
- Add routing to the document flow
- Set the top and bottom applications' routing
- Add a routing condition to the applications
- Create the first and second condition builders
- Select the condition branches
- Configuring message source settings for multiple back office integration

Note: These steps need to be repeated for each Process BOD Noun.

Creating a document flow for each BOD noun and ERP

To create a document flow for each BOD Noun and ERP:

- 1 In Infor ION Desk, select **Model > Connect > Document Flows**.
- 2 Click **New**.
- 3 Specify this information:

Name

Specify a unique name for the new document flow.

Note: We recommend that you include the BOD noun and the BOD in the document flow name.

Description

Specify the description of the new document flow.

Adding an application to an activity

To add an application to an activity:

- 1 In the Activities window, click the **Application** icon.
- 2 Click the line between the Start and End points to add the first 2 activities.
- 3 In the Application Task window, click **Add**.
Note: To add a new application, see the ION Connect Administration Guide.
- 4 In the Add Application window, select the source application and click **OK**.
- 5 Click the line between the first activity and the End point to add a second activity.
- 6 In the Add Application window, select the source application.
- 7 Click **OK**.

Adding documents to the activities

To add documents to the activities:

- 1 Click the **Document** icon between Activity 1 and Activity 2.
- 2 In the Documents window, click **Add**.
- 3 Select the document and verb to map. For example, Process Customer Party Master.

Add routing to the document flow

A routing must be added for each Accounting Entity in each Process Document Flow.

To add routing to the document flow:

- 1 Click the Flow window to view the Routing icons.
- 2 Select the Routing icon and click the line between Activity 1 and Activity 2.
- 3 Click the Activities window and select the Application icon.
- 4 Click on both lines displayed in the routing flow to add activities to the destination applications.

Note: To add another flow to another connection point, right-click the Flow and select Add Branch. Repeat Steps 3 and 4 for each Connection Point.

Setting the top and bottom applications' routing

To set the top and bottom applications' routing:

- 1 Click the top activity in the routing flow.
- 2 In the Application Task window, click Add.
- 3 In the Add Application window, select an application and click **OK**.
- 4 Click the bottom activity in the routing flow.
- 5 In the Application Task window, click Add.
- 6 In the Add Application window, select an application and click **OK**.

Adding a routing condition to the applications

To add a routing condition to the applications:

- 1 Select the Routing icon.
- 2 In the Routing Properties window, click **Add**.
- 3 In the Select Attributes window, expand the CustomerPartyMaster BOD.
- 4 Expand the Predefined Attributes folder.
- 5 Select the **AccountingEntityID** check box.
- 6 Click **OK**.

Note: Some ERP Nouns do not contain an Accounting Entity. For example, the Contact Master for ERP A+. To determine whether the ERP noun for your ERP system contains an Accounting Entity, see the integration guide for the specific ERP system(s) you have integrated with Infor Back Office Connect.

Creating the first and second condition builders

To create the first and second condition builders:

- 1 In the Routing Properties window, select the **Conditions** tab.
- 2 Click **Add**.
- 3 In the Condition Builder window, specify this information:
 - Name**
Specify the name of the condition.
 - Parameter**
Select AccountingEntityID.
 - Value**
Specify the value of the AccountingEntityID.
- 4 Click **OK**.
- 5 Repeat Steps 3 and 4 for the next Condition Builder. This needs to be done for each Connection point where Infor Back Office Connect is publishing a Process BOD for the Noun.

Selecting the condition branches

To select the condition branches:

- 1 In the Used Conditions section, select the name of the first condition for the first branch.
- 2 Repeat Step 1 for the second branch. Repeat this step for each condition.

Configuring message source settings for multiple back office integration

The message source settings specify the Back Office, Default Accounting ID, and ION Logical ID that are used to configure ERP to publish BOD documents to ION. Message source settings are customer-specific based on the ERP system being connected with ION and Infor Back Office Connect.

To configure message source settings:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Integration Setup** tab.
- 4 Click [Step 3: Configure Message Source](#).
- 5 Click **New Message Source**.
- 6 Specify this information:

Message SourceName

The default value is Message Source. To modify the value, specify the ERP that is your system of record. The message source is the application you are integrating with Infor Back Office Connect through ION. For example, ERP LN.

Logical ID

The default value is Infor. To modify this value, specify the logical ID for the ERP application connection point in ION. The application connection point is the unique identifier that connects the ERP system with ION .

URL

The URL of the message source.

Default Accounting Entity ID

The default value is Default. To modify the value, specify the accounting entity from your ERP. For example, if you are integrating with ERP LN, the value specified corresponds with the Company Number in ERP LN. This value is required.

Default Location ID

Specify the default location for the ERP with which you are integrating. Default Location ID is used when the ERP is configured with multiple sites. This value is optional.

Active?

Select this Active? check box to activate the message source.

Entity Selection

Specify the BOD entity mapping for the ERP. BOD entity mappings are used to define objects and objects with BODs that are associated with outbound processes. This value is required.

Note: Ensure that you choose the nouns you want to be published to the message source you selected.

- 7 Click **Save**.
- 8 Click **Message Source Name**.
- 9 Click **New Message Source BOD Type Version**.
- 10 Click the BOD Type Version lookup and select **BOD Type Version**.
- 11 Click **Save**.
- 12 Repeat steps 9 through 11 for each BOD Type Version supported by the back office.

This chapter describes the tasks that you must complete to upgrade to the latest version of Infor Back Office Connect installed on your Salesforce organization.



Caution: Earlier Infor Back Office Connect implementations must be updated to version 10.6.x prior to migrating to the latest version. The latest Infor Back Office Connect version release contains several new enhancements that require transformation of the data structures and data content of previous versions (10.6.x or earlier).

This is a list of enhancements and new features that are installed as a part of the upgrade to the current Infor Back Office Connect version:

- **Data Storage Reduction:** Numerous schema changes have been implemented to reduce the number of Salesforce records being consumed and thus reducing the cost of ownership. As a result most of the transactional addresses have been moved from related records to the actual transactional records. This data storage reduction will require updates to the existing page layouts once the data has been migrated.
- **Updated Street Address Interface:** Street addresses have moved from the six individual address lines to one formatted Text Area for the Street Address. This user interface enhancement will require updates to the existing page layouts once the data has been migrated.
- **Multi-Company Support:** Infor Back Office Connect is now able to uniquely identify and track BODs from multiple ERP companies based on the Accounting Entity ID. This enhanced implementation of Accounting Entity requires migration of the existing data to be compatible with the new Unique ID field.
- **Multi-Back Office Support:** Infor Back Office Connect is now able to support BOD interfaces with multiple ERPs at the same time. This enhanced feature now supports the ability to define multiple message sources in Infor Back Office Connect. Multiple ERPs routed through a common ION interface may now be connected to a common instance of Infor Back Office Connect. The migration process will update the existing data to be related to the existing Message Source.
- **Infor Quotes:** ERP Quotes and local Salesforce based quotes are accessed from a new, custom object called Infor Quote. The Infor Quote object may still be related to an Opportunity, but it is no longer constrained by a master-detail relationship with the Opportunity object. The Infor Quote can be related to an Opportunity, Account and/or Contact via a lookup relationship. The generic Data Migration process included in the upgrade does not include migration of standard quotes to the Infor Quote object. The existing ERP Quotes and Salesforce based quotes must be migrated to the Infor

Quote Object using a separate application called Infor Back Office Connect Migration. See "Infor quote migration" on page 193.

- **Any BOD Support:** Enhanced BOD field mappings have been implemented to allow integrators the ability to re-map or disable existing fields as well as implement new fields or complete BODs as needed.
- **Optional Master Data:** With the enhanced BOD field mapping support, it is now possible to remove the dependency upon the Master Data Ship-to, Bill-to, and Pay-from. The removal of these Master Data items does not impact the usability of the transactional detail as the addresses of record, Ship-to, Sold-to, Bill-to, and Pay-from are stored with each transaction.
- **Unit Groups:** The **Enable Standard Group** configuration setting has been added to the Integration Setup page to specify the way in which unit groups for units of measure are processed within Infor Back Office Connect. See "Understanding unit group processing in Infor Back Office Connect" on page 34. When you upgrade Infor Back Office Connect to the current version, the unit groups functionality is automatically enabled (the **Enable Standard Group** is not selected). If you choose to enable the Standard unit group functionality (by selecting the **Enable Standard Unit Group** check box), you must remove the **Unit Group** field from the Infor Back Office Connect Products page layout and make the field optional for any other page layouts containing the field (by clearing the **Required** check box in the field properties). If you enable the Standard unit group functionality, we recommend that you perform the additional steps required to migrate your unit of measure data from unit groups to the Standard unit group. This additional migration is not required, but is recommended to reduce the data storage required for these units of measure. "Migrating unit group data".

Overview of Infor Back Office Connect 10.8 compatibility

Infor Back Office Connect 10.6.1 data must be migrated prior to actively using it in Infor Back Office Connect version 10.8. Infor Back Office Connect versions earlier than 10.6.1 must be upgraded to Infor Back Office Connect version 10.6.1 or 10.6.3 prior to upgrading to Infor Back Office Connect version 10.8.

To reduce data storage requirements, schema changes have been made to Bill-to, Ship-to, or Pay-from many-to-many relationships. The schema changes support the optional transition of data stored in the many-to-many junction object for Accounts and their respective Bill-to, Ship-to, or Pay-from objects using Lookup fields. As a result, an Account can have multiple Bill-to or Ship-to addresses.

To support these changes, a set of many-to-many configuration settings has been added to the Configure Infor Back Office Connect Settings section of the Integration Setup page. When the respective many-to-many configuration settings are disabled, the Bill-to or Ship-to addresses are related to only one Account.



Caution: Many-to-many configuration settings must be configured manually prior to migrating your existing data to Infor Back Office Connect version 10.8.

See "Configuring Infor Back Office Connect settings" on page 45 and "Understanding many-to-many configuration settings" on page 36.

Before migrating your data and configuring your many-to-many settings, see these version-specific guidelines:

- If you are upgrading from version 10.6.1 or 10.6.3, your many-to-many configuration settings must be determined based on your Salesforce Data Storage Report.

After analyzing the data in the Salesforce Data Storage Report, configure your many-to-many settings based on these additional guidelines:

- Enable the Account Ship-to many-to-many setting if the record count for Account Ship-to Roles is greater than the record count for Ship-to Records
- Enable the Account Bill-to many-to-many setting if the record count for Account Bill-to Roles is greater than the record count for Bill-to Records
- Enable the Ship-to Bill-to many-to-many setting if the record count for Ship-to Bill-to Roles is greater than the record count for Bill-to Records
- Enable the Bill-to Pay-from many-to-many setting if the record count for Bill-to Pay-from Roles is greater than the record count for Pay-from Records
- Disable the many-to-many setting if the respective Roles record count is zero or is not found in the Salesforce Data Storage report

Optionally, after completing the initial data migration, the Infor Back Office Connect administrator or system administrator can also use the many-to-many configuration settings to enable or disable future support of the Account Ship-to, Account Bill-to, Ship-to Bill-to, and Bill-to Pay-from many-to-many relationships as necessary.

Note: Modifying the many-to-many configuration settings on the Integration Setup screen impacts BOD processing (new inbound documents from ERP) and the data migration process from the many-to-many role junction objects to the new one-to-many lookup fields.



Caution: The data migration process supports the transition of Infor Back Office Connect 10.6.x data from many-to-many to the new one-to-many relationships to reduce data storage requirements. The data migration does not support data conversion from one-to-many back to the original many-to-many junction role-based relationships.

Infor Back Office Connect pre-upgrade checklist

This checklist includes the list of tasks you must complete to prior to upgrading Infor Back Office Connect. See the appropriate section of this guide for detailed instructions on how to complete these tasks.

We recommend that you complete these pre-upgrade tasks in this order:

- Confirm that you have access to these user profiles and their passwords: Infor Back Office Connect Administrator, integration user, the default record owner, and the system administrator
- Confirm the Infor Back Office Connect version number installed on your Salesforce organization
- Download the most recent version of the *Infor Back Office Connect Release Notes* from the Infor Xtreme Support portal and review the content of the document
- Stop the scheduler and verify that it is stopped.
- Record the Infor Back Office Connect, ERP, and ION tenant configuration information and settings from the Configure Message Source Settings, Configure Infor Back Office Connect Settings, and the Infor Back Office Connect Adapter Scheduler Settings sections of the **Integration Setup** tab so that you can verify that none of these settings change following the upgrade. See "Configuring the Infor Back Office Connect application for ERP integration" on page 40.

Note: We recommend taking screen shots of the screens containing the configuration information and settings.

Confirming the Infor Back Office Connect version number

Before beginning the upgrade process, verify the Infor Back Office Connect version number installed on your Salesforce organization. The Infor Back Office Connect version number is displayed in the **Version Number** field on the Installed Packages page. See "Confirming the Infor Back Office Connect package installation" on page 30 .

Downloading the Infor Back Office Connect release notes

The *Infor Back Office Connect Release Notes* provide you with detailed information on each Infor Back Office Connect release, including the deliverables, product features, and product improvements in the current release. We recommend that you download and review the *Infor Back Office Connect Release Notes* from the Infor Back Office Connect product knowledge base on the support portal web site before beginning the Infor Back Office Connect upgrade process.

To download the Infor Back Office Connect release notes:

- 1 Open a web browser.
- 2 Enter the URL for the Infor Xtreme Support portal login screen: <http://www.inforxtreme.com/allogin/allogin.aspx>.
- 3 Specify the e-mail address and password for your Infor Xtreme user account.
- 4 Click **Login**. The Infor Infor Xtreme Support Home Page is displayed.
- 5 Select **Knowledge Base > Search**. The KB Search page is displayed.
- 6 In the Available Product Lines list, select **Salesforce** and click **Add**.
- 7 In the **Search For** field, specify the Infor Back Office Connect KB number **1149054** and click **Search**.
- 8 Locate Infor Back Office Connect Release Updates in the search results and click the link.

- 9 In the Infor Back Office Connect Documentation section click the link to the *Infor Back Office Connect Release Notes*. The *Infor Back Office Connect Release Notes* are displayed.
- 10 Save the document to a local drive.

Stopping the scheduler

The scheduler is the Infor Back Office Connect component that sends messages. The messages trigger the processing of inbound and outbound Batch Apex jobs (by the adapter) to process inbound and outbound messages.

To stop the scheduler:

- 1 Log into Salesforce as the Integration context user.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Integration Setup** tab.
- 4 On the **Integration Setup** tab, click [Step 7: Start/Stop Scheduler](#).
- 5 Click **Stop ION Integration Scheduler**. A confirmation message is displayed.

Note: Do not restart the scheduler until after data migration and validation have occurred.

See "Post-upgrade tasks checklist" on page 153.

Verifying whether the scheduler is stopped

To verify whether the scheduler is stopped:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Jobs > Scheduled Jobs**.
- 4 In the All Scheduled Jobs list, verify that the Job Name IONBatchExecutor is not displayed. If the IONBatchExecutor job is displayed, the scheduler is still running.

Upgrading Infor Back Office Connect

To upgrade Infor Back Office Connect, run the latest Infor Back Office Connect package on your Salesforce organization. The latest Infor Back Office Connect package is available from the Infor Back Office Connect product knowledge base on the support portal web site.

To upgrade Infor Back Office Connect:

- 1 Log into Salesforce as the system administrator.
- 2 Open an additional browser tab.

Note: Do not log out of the Infor Back Office Connect application when you open another browser tab.

- 3** Login to the Infor Xtreme Support portal and navigate to the Infor Back Office Connect KB page. See "Downloading the Infor Back Office Connect release notes" on page 150.
- 4** Locate Infor Back Office Connect Installation URL and click the link to begin the package upgrade installation. The Package Upgrade Details page is displayed in the Salesforce organization you are currently logged into. This page displays a summary of the Infor Back Office Connect version you are upgrading to, including the package components, the changed objects and resources, code updates, and field and page updates.
- 5** Review the package upgrade details and click **Continue**. The Approve Third-Party Access window is displayed.
- 6** Select the **Yes, grant access to these third-party web sites check box** and click **Continue** to display the Step 1. Approve Package API Access page.
- 7** Review the extended object permissions and click **Next** to display the Step 2. Choose security level page.
- 8** Select the **Select security sections** option. The Customize security section is displayed.
- 9** In the Profile list, select the Infor Back Office Connect Administrator profile.
- 10** In the Access Level list for the Infor Back Office Connect Administrator profile, select Infor Back Office Connect Administrator.
- 11** In the Profile list, select the Infor Back Office Connect Developer profile.
- 12** In the Access Level list for the Infor Back Office Connect Developer profile, select Infor Back Office Connect Developer.
- 13** In the Profile list, select the Infor Back Office Connect User profile.
- 14** In the Access Level list for the Infor Back Office Connect User profile, select Infor Back Office Connect User.
- 15** In the Profile list, select the Infor Back Office Connect Read Only User profile.
- 16** In the Access Level list for the Infor Back Office Connect Read Only User profile, select Infor Back Office Connect Read Only User.
- 17** Click **Next** to display the Step 3. Install Package page.
- 18** Click **Install**. The package installation begins and a confirmation is displayed. After the package is installed successfully, Salesforce sends an e-mail notification to the Infor Back Office Connect Administrator.



Caution: Before continuing to the data migration portion of the upgrade process, you must log out of Salesforce and log back in as the integration context user.

Post-upgrade tasks checklist

This checklist includes the list of tasks you must complete after installing the Infor Back Office Connect 10.8 upgrade package on your Salesforce organization. See the appropriate section of this guide for detailed instructions on how to complete these tasks.

- Review any version-specific post-upgrade instructions in the for the latest version *Infor Back Office Connect Release Notes*.

Note: If the *Infor Back Office Connect Release Notes* include any post-upgrade instructions, the information in the *Infor Back Office Connect Release Notes* supersedes the information provided in this document.

- Login to the Salesforce organization on which you upgraded Infor Back Office Connect as the Integration context user and load the seed data for Infor Back Office Connect version 10.8. See "Loading seed data for Infor Back Office Connect version 10.7" .
- On the Integration Setup page, enable or disable the Standard Unit Group and many-to-many configuration settings based on the business requirements of your integration and save the updated settings.
- Check the Infor Back Office Connect, ERP, and ION tenant configuration information and settings on the Configure Message Source Settings, Configure Infor Back Office Connect Settings, and the Infor Back Office Connect Adapter Scheduler Settings sections of the **Integration Setup** tab to verify whether any of the settings changed as a result of the upgrade and make any necessary corrections or revisions.
See "Configuring the Infor Back Office Connect application for ERP integration" on page 40.
- Test the adapter connection.
See "Testing the Infor Back Office Connect scheduler and scheduler connection" on page 52.
If the adapter connection is successful, a confirmation message is displayed. If the connection fails, verify your adapter settings and test the connection again.
- Migrate existing Infor Back Office Connect data to the Infor Back Office Connect version 10.8.
See "Migrating existing data to Infor Back Office Connect version 10.8" on page 154 .
- Migrate quote data from the standard Salesforce Quote object to the new Infor Back Office Connect Quote object.
See "Infor quote migration" on page 193.
- Update page layouts and verify existing data content.
See "Updating the account page layout for Infor Back Office Connect version 10.7", "Updating custom object page layouts for Infor Back Office Connect version 10.7" on page 155, and "Verifying existing data content for Infor Back Office Connect version 10.8" on page 161.
- Start the ION Integration Scheduler.
See "Starting the scheduler".
- Verify that the scheduler is started.
See "Verifying whether the scheduler is started" on page 57.

Understanding the data migration process for the Infor Back Office Connect 10.8 upgrade

This section describes the data migration tasks you must perform to complete the Infor Back Office Connect version 10.8 upgrade. See the appropriate section of this guide for detailed instructions on how to complete these tasks.



Caution: Before completing any of the data migration tasks, you must first have upgraded your Salesforce organization to Infor Back Office Connect version 10.8 by installing the 10.8 package as the Salesforce System Administrator user.

We recommend that you complete the data migration tasks in this order:

- On the Data Migration tab in Infor Back Office Connect Administration, migrate the 10.6.x data into the 10.8.x schema. See "Migrating existing data to Infor Back Office Connect version 10.8" on page 154.
- Migrate quote data from the standard Salesforce Quote object to the new Infor Back Office Connect object. To migrate your quote data, you must first install the Infor Back Office Connect Migration application on your Salesforce organization. See "Installing the Infor Back Office Connect Migration application" on page 198

After performing the data migration, verify that these conditions are true:

- The Address Object still contains secondary Master Data Addresses.
- If the Many-to-many relationship configuration settings are not selected, the Master Data Junction Objects, Account Ship-to Roles, Account Bill-to Roles, Ship-to Bill-to Roles and Bill-to Pay-from Roles are empty.
- All Transaction Address are empty except for Quote Related Addresses.

Migrating existing data to Infor Back Office Connect version 10.8

To migrate existing data to Infor Back Office Connect version 10.8:

- 1 Log into Salesforce as the Integration context user.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Data Migration** tab.

Note: If the **Data Migration** tab is not displayed by default, click the plus icon (+) to display all tabs and click the [Data Migration](#) link in the All Tabs list.

- 4 Specify this information:

Batch Name

The default value is ALL.

Object Name

The default value is All.

Number of Records to Migrate

Specify ALL.

Include AEID in contact unique ID

Clear this checkbox only if you are migrating ERP-A+ based data.

5 Click Start Selected Batch.

Note: Depending upon the content of your pre-existing data, an error message can be displayed indicating that there are no records to process. If this error message is displayed, click **OK** to complete the data migration process.

Updating custom object page layouts for Infor Back Office Connect version 10.7

These custom object page layouts must be updated for Infor Back Office Connect version 10.7: Bill-to, Customer Return, Invoice, Pay-from, Receivable, Sales Order, Ship-to, and Shipment.

To update custom object page layouts for Infor Back Office Connect version 10.7:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Create > Objects**.
- 5 In the Custom Objects section, click the desired object in the Label column. See Salesforce documentation.

Note: Custom objects will display one page layout unless additional custom page layouts were added by the implementation.

- 6 In the Page Layouts section, click **Edit**.



Caution: Each page layout must be saved before progressing to the next page layout.

- 7 For the Bill-to object page layout, add these new related lists:
 - Infor Quotes
 - Pay-from Records (if the Bill-to Pay-from Many-to-many setting is not selected)
- 8 For the Bill-to object page layout, remove these related lists:
 - Bill-to- Pay-From Role (if the Bill-to Pay-from Many-to-many setting is not selected)
 - Account Bill-to Role (if the Account Bill-to Many-to-many is not selected)
 - Ship-to Bill-to Role (if the Ship-to Bill-to Many-to-many is not selected)
- 9 For the Bill-to object page layout, remove these retired fields:

- zz_Bill-to Lines 1 through 6
- zz_Primary Contact

10 For the Bill-to object page layout, add these new fields:

- Account (if the Account Bill-to Many-to-many is not selected)
- Message Source
- Ship-to (if the Ship-to Bill-to Many-to-many is not selected)
- Street

11 Save the changes to the Bill-to object page layout.

12 For the Customer Return object page layout, remove these retired fields:

- zz_Bill-to Lines 1 through 6
- zz_Bill-to City
- zz_Bill-to Country/Region
- zz_Bill-to State
- zz_Bill-to Zip/Postal Code
- zz_Sold-to Lines 1 through 6
- zz_Sold-to City
- zz_Sold-to Country/Region
- zz_Sold-to State
- zz_Sold-to Zip/Postal Code

13 For the Customer Return object page layout, add these new fields:

- Bill-to City
- Bill-to Country/Region
- Bill-to Street
- Bill-to State/Province
- Bill-to Zip/Postal Code
- Sold-to City
- Sold-to Country/Region
- Sold-to Street
- Sold-to State/Province
- Sold-to Zip/Postal Code

14 Save the changes to the Customer Return object page layout.

15 For the Invoice object page layout, remove these retired fields:

- zz_Bill-to Lines 1 through 6
- zz_Bill-to City
- zz_Bill-to Country/Region
- zz_Bill-to State

-
- zz_Bill-to Zip/Postal Code
 - zz_Sold-to Lines 1 through 6
 - zz_Sold-to City
 - zz_Sold-to Country/Region
 - zz_Sold-to State
 - zz_Sold-to Zip/Postal Code

16 For the Invoice object page layout, add these new fields:

- Bill-to City
- Bill-to Country/Region
- Bill-to Street
- Bill-to State/Province
- Bill-to Zip/Postal Code
- Sold-to City
- Sold-to Country/Region
- Sold-to Street
- Sold-to State/Province
- Sold-to Zip/Postal Code

17 Save the changes to the Invoice object page layout.

18 For the Invoice Line object page layout, remove these retired fields:

- zz_Ship-to Lines 1 through 6
- zz_Ship-to City
- zz_Ship-to Country/Region
- zz_Ship-to State/Province
- zz_Ship-to Zip/Postal Code

19 Save the changes to the Invoice Line object page layout.

20 For the Pay-from object page layout, remove these retired related lists:

- zz_Primary Contact
- Quotes
- Bill-to Pay-From Roles (if the Bill-to Pay-from Many-to-many setting is not selected)

21 For the Pay-from object page layout, add this new related list:

- Infor Quotes

22 For the Pay-from object page layout, remove these retired fields:

- zz_Pay-from Lines 1 through 6
- zz_Primary Contact

23 For the Pay-from object page layout, add these new fields:

- Bill-to (if the Bill-to Pay-from Many-to-many setting is not selected)
- Message Source
- Street

24 Save the changes to the Pay-from object page layout.

25 For the Receivable object page layout, remove these retired fields:

- zz_Attention of Name
- zz_Bill-to Lines 1 through 6
- zz_Bill-to City
- zz_Bill-to Country/Region
- zz_Bill-to State/Province
- zz_Bill-to Zip/Postal Code
- zz_Pay-from Lines 1 through 6
- zz_Pay-from City
- zz_Pay-from Country/Region
- zz_Pay-from State/Province
- zz_Pay-from Zip/Postal Code
- zz_Sold-to Lines 1 through 6
- zz_Sold-to City
- zz_Sold-to Country/Region
- zz_Sold-to State/Province
- zz_Sold-to Zip/Postal Code

26 For the Receivable object page layout, add these new fields:

- Bill-to Attention
- Bill-to City
- Bill-to Country/Region
- Bill-to Street
- Bill-to State/Province
- Bill-to Zip/Postal Code
- Pay-from Attention
- Pay-from City
- Pay-from Country/Region
- Pay-from Street
- Pay-from State/Province
- Pay-from Zip/Postal Code
- Sold-to Attention
- Sold-to City
- Sold-to Country/Region
- Sold-to Street

-
- Sold-to State/Province
 - Sold-to Zip/Postal Code

27 Save the changes to the Receivable object page layout.

28 For the Sales Order object page layout, remove these retired fields:

- zz_Bill-to Lines 1 through 6
- zz_Bill-to City
- zz_Bill-to Country/Region
- zz_Bill-to State/Province
- zz_Bill-to Zip/Postal Code
- zz_Ship-to Lines 1 through 6
- zz_Ship-to City
- zz_Ship-to Country/Region
- zz_Ship-to State/Province
- zz_Ship-to Zip/Postal Code
- zz_Sold-to Lines 1 through 6
- zz_Sold-to City
- zz_Sold-to Country/Region
- zz_Sold-to State/Province
- zz_Sold-to Zip/Postal Code

29 For the Sales Order object page layout, add these new fields:

- Bill-to City
- Bill-to Country
- Bill-to Street
- Bill-to State/Province
- Bill-to Zip/Postal Code
- Ship-to City
- Ship-to Country/Region
- Ship-to Street
- Ship-to State/Province
- Ship-to Zip/Postal Code
- Sold-to City
- Sold-to Country/Region
- Sold-to Street
- Sold-to State/Province
- Sold-to Zip/Postal Code

30 Save the changes to the Sales Order object page layout.

31 For the Ship-to object page layout, remove this retired related list:

- Quotes
- Account Ship-to Roles (if the Account Ship-to Many-to-many setting is not selected)
- Ship-to Carrier Party Roles
- Ship-to Bill-to Roles (if the Ship-to Bill-to Many-to-many setting is not selected)

32 For the Ship-to object page layout, add these new related lists:

- Bill-to Records (if the Ship-to Bill-to Many-to-many is not selected)
- Infor Quotes

33 For the Ship-to object page layout, remove these retired fields:

- zz_Primary Contact
- zz_Ship-to Lines 1 through 6
- Unique ID

34 For the Ship-to object page layout, add these new fields:

- Account
- Carrier Name
- Message Source
- Street
- City
- State/Province
- Zip/Postal Code
- Country/Region

35 Save the changes to the Ship-to object page layout.

36 For the Shipment object page layout, remove these retired fields:

- zz_Return-to Lines 1 through 6
- zz_Return-to City
- zz_Return-to Country/Region
- zz_Return-to State/Province
- zz_Return-to Zip/Postal Code
- zz_Ship-to Lines 1 through 6
- zz_Ship-to City
- zz_Ship-to Country/Region
- zz_Ship-to State/Province
- zz_Ship-to Zip/Postal Code

37 For the Shipment object page layout, add these new fields:

- Account
- Return-to City
- Return-to Country/Region

- Return-to Street
- Return-to State/Province
- Return-to Zip/Postal Code
- Ship-to City
- Ship-to Country/Region
- Ship-to Street
- Ship-to State/Province
- Ship-to Zip/Postal Code

38 Save the changes to the Shipment object page layout.

Verifying existing data content for Infor Back Office Connect version 10.8

Data Validation is accomplished by reviewing the content of known Accounts and Contacts and their corresponding transactions.

Updating the Infor Back Office Connect logo for Infor Back Office Connect version 10.8

After upgrading from Infor Back Office Connect version 10.7.x you must update the Infor Back Office Connect logo.

To update the Infor Back Office Connect logo:

- 1** Log in to Salesforce as the system administrator.
- 2** Click the plus icon (+) to display all tabs.
- 3** In the All Tabs list, click [Documents](#).
- 4** In the Document Folders pull-down list, select **Shared Documents**.
- 5** Click **New Document**.
- 6** In the Upload New Document section, specify information for these fields:

Document Name

Enter a name for this document.

Document Unique Name

Specify a unique name, for example: InforLogo_2013.

Externally Available Image

Select this checkbox.

Enter the path of the file or click browse to find the file.

Select this option and click **Choose File**.

- 7 Click **Save**.
- 8 Select **Setup**.
- 9 In the sidebar column, select **App Setup > Create > Apps**.
- 10 In the App Label column, click **Infor Back Office Connect > Edit**.
- 11 In the Choose the Image Source for the Custom App Logo section, click **Insert an Image**.
- 12 In the File Location pull-down list, select **Shared Documents**.
- 13 Select the new logo file.
- 14 Click **Save**.

Migrating units of measure (optional)

If you are upgrading to the latest version of Infor Back Office Connect from a previous version, the unit groups functionality is enabled by default. See "Understanding unit group processing in Infor Back Office Connect" on page 34. If you want to enable the Standard unit group functionality as a part of your upgrade, we recommend that you complete these additional configuration steps:

- Migrate all unit group data to the Standard unit group. See "Migrating units of measure from unit groups to a Standard unit group" on page 162.
- Make the **Unit Group** field non-required on your page layouts and the **Unit Group** field must be removed entirely from the Products page layout. See Salesforce documentation.

Note: If you configured Infor Back Office Connect to process units of measure using a Standard unit group and want to restore the default unit group processing functionality, you must complete these steps to migrate your units of measure from the Standard unit group to unit groups:

- Clear the **Enable Standard Unit Group** check box in the Infor Back Office Connect Settings on the Integration Setup page. See "Configuring Infor Back Office Connect settings" on page 45.
- Republish all Item Master BODs

Migrating units of measure from unit groups to a Standard unit group

If you configured Infor Back Office Connect to process units of measure using a Standard unit group by checking the Enable Standard Unit Group check box in your Infor Back Office Connect Settings on the Integration Setup page, we recommend that you migrate all of your units of measure from unit groups to the Standard unit group. This migration process will:

- Create a Standard unit group
- Add a unique unit of measure in the Standard unit group for all existing units of measure
- Relate all existing products to the new units of measure
- Delete all unit groups and units of measure that are not assigned to the Standard unit group

Note: When the Standard unit group functionality is enabled and you are migrating your data from unit groups to the Standard unit group, the migration process does not delete any unit groups that are not related to a product.

To migrate units of measure from unit groups to a Standard unit group:

- 1 Log into Salesforce as the Integration context user.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Data Migration** tab.

Note: If the **Data Migration** tab is not displayed by default, click the plus icon (+) to display all tabs and click the [Data Migration](#) link in the All Tabs list.

- 4 Specify this information:
 - Select **Migrate Unit Group Data** from the **Batch Name** list.
 - Verify that ALL is selected from the **Object Name** list.
 - Specify **ALL** as the **Number of Records to Migrate**.
 - Clear the **Include AEID in contact unique ID** checkbox
- 5 Click **Start Selected Batch**.

Migrating units of measure from a Standard unit group to unit groups

If you configured Infor Back Office Connect to process units of measure using a Standard unit group and want to restore the default unit group processing functionality, you must complete these steps to migrate your units of measure from the Standard unit group to unit groups:

- Clear the **Enable Standard Unit Group** check box in the Infor Back Office Connect settings on the Integration Setup page. See "Configuring Infor Back Office Connect settings" on page 45.
- Republish all Item Master BODs

See "Understanding unit group processing in Infor Back Office Connect" on page 34.

Note: When you clear the **Enabled Standard Unit Group** setting and you migrate your data to unit groups from a Standard unit group, all duplicate units of measure in the existing unit groups are deleted during the migration process.

By default, Infor Back Office Connect includes an PDF quote document template (QuoteToPDFPage) that is used to generate Infor quote PDF documents.

To modify or customize a quote PDF template based on your business requirements, you must install the Custom Quote PDF Reference package, and then update the customizable Infor Back Office Connect static resource file (customPDF.zip), update your document controller settings, and modify the Apex code on the custom Visualforce page (QuoteToPDFPage1) to implement your custom quote PDF template.



Caution: Modifying the Apex code for the custom quote PDF Visualforce page (QuoteToPDFPage1) requires knowledge of coding and development in the Salesforce Apex programming language. If the administrator or developer attempting to modify or update the Apex code on the Visualforce page is not familiar with coding and development in Apex code, we recommend that a qualified resource delivers the code set required for your modifications.

After creating the customized quote PDF template, you must modify your Configure Quote PDF Settings in the Step 6. Configure Infor quote and Opportunity Settings section of the Integration Setup screen to point to the customized quote PDF template. See "Configuring Infor quote and opportunity settings" on page 52.

Enabling development mode for the user creating or editing Visualforce pages

Before creating or modifying Visualforce pages, you must enable development mode for the user record of the administrator or developer who will be creating or modifying the Visualforce pages in your Salesforce organization.

To enable development mode for the user creating or editing Visualforce pages:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Personal Setup > My Personal Information > Personal Information**.

- 4 Click **Edit**.
- 5 In the General Information section, select the **Development Mode** check box.
- 6 Click **Save**.

Installing the Custom Quote PDF Reference package

Install the Custom Quote PDF Reference package required to access the customizable Infor Back Office Connect static resource file, document controller, and Visualforce page for customizing the quote PDF template based on your business requirements.

To install the Custom Quote PDF Reference package:

- 1 Log in to Salesforce as the system administrator.
- 2 Click the URL for the Custom Quote PDF Reference package installer provided by Infor to display the Package Installation Details page.
- 3 Review the Custom Quote PDF Reference package installation details and click **Continue** to display the Step 1. Approve Package API Access page.
- 4 Review object and object permission details and click Next to display the Step 2. Choose security level page.
- 5 Select the **Select security settings** check box to display the Customize security section.
- 6 Select **Full Access** as the **Access Level** for the Infor Back Office Connect Administrator, Infor Back Office Connect Developer, and Infor Back Office Connect User profiles.
- 7 Click **Next** to display the Step 3. Install Package page.
- 8 Click **Install**.
- 9 In the Install Package page, click **Install**. The reference package is installed and a confirmation message is displayed.
- 10 Select **Setup**.
- 11 In the sidebar column, select **Installed Packages**.
- 12 In the Installed Packages list, verify that the Custom Quote PDF Reference package is installed in your Salesforce organization.

Confirming the components installed with the Custom Quote PDF Reference package

After installing the Custom Quote PDF Reference package, confirm the installation of the following components:

- The customPDF static resource file (customPDF.zip) containing the custom logo and the .css file
- The QuoteDocumentController1 Apex class

- The QuoteToPDFPage1 custom Visualforce page

Confirming the installation of the customPDF static resource file

The customPDF static resource file contains the customizable style sheet (customStyle.css) and the default logo (logo.png) used to generate quote PDF documents. To customize your quote PDF templates, you must download the customPDF static resource file as a .zip file and save it to a local drive. You can then use the customStyle.css to modify your document template and replace the default logo with your company logo.

To confirm the installation of the customPDF static resource file:

- 1 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Develop > Static Resources**.
- 4 In the Static Resources list, click the [customPDF](#) hyperlink to display the Static Resource Detail page for the customPDF static resource.

Confirming the installation of the QuoteDocumentController1 Apex class

The QuoteDocumentController1 is a customizable Apex class used to create a template for the PDF quote document.

To confirm the installation of the QuoteDocumentController1 Apex class:

- 1 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Develop > Apex Classes**.
- 4 In the Static Resources list, click the [QuoteDocumentController1](#) hyperlink to display the Apex Class Detail page for the QuoteDocumentController1 Apex class.

Confirming the installation of the QuoteToPagePDF1 Visualforce page

The QuoteToPagePDF1 is a customizable Visualforce page used to customize and modify a custom quote PDF to replace the default quote PDF document.

To confirm the installation of the QuoteToPagePDF1 Visualforce page:

- 1 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Develop > Pages**.
- 4 In the Visualforce Pages list, click the [QuoteToPagePDF1](#) hyperlink to the Visualforce Page Detail page for the QuoteToPagePDF1 page.

Replacing the default quote PDF logo with your company logo

As a part of the quote PDF customization process, you can replace the default quote PDF logo (logo.png) used to generate quote PDF documents with your custom company logo.

Complete these tasks to replace the default quote PDF logo with your company logo:

- Download the customPDF.zip static resource file to a local drive
- Replace the default logo in the customPDF.zip static resource file
- Update the customPDF.zip static resource file in Infor Back Office Connect
- Update the custom quote PDF Visualforce page (QuoteToPDFPage1) to reference your custom company logo
- Validate that the custom logo is displayed in quote PDF output

Downloading the customPDF static resource file to a local drive

The customPDF static resource file (customPDF.zip) contains the customizable style sheet (customStyle.css) and the default logo (logo.png) used to generate quote PDF documents. To customize your quote PDF templates, you must download the customPDF static resource file and extract its contents to a local drive. You can then use the customStyle.css to modify your document template and replace the default logo with your company logo.

To download the customPDF static resource file:

- 1 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Develop > Static Resources**.
- 4 In the Static Resources list, click the [customPDF](#) hyperlink to display the Static Resource Detail page for the customPDF static resource.
- 5 Right-click on the [View File](#) hyperlink in the Static Resource Details and choose **Save link as...** and save the file to a local drive as **customPDF.zip**.
- 6 Extract all of the contents of the customPDF.zip file to a local drive.

Note: We recommend that you extract the contents of the customPDF.zip file to the same location to which you saved the .zip file.

- 7 Make a note of the location to which you saved and extracted the contents of the customPDF.zip file. You must access the contents of the customPDF.zip file to define properties and customizations for your quote PDF template.
- 8 Continue to the next step of the process. See "Replacing the default logo in the custom PDF static resource file" on page 169 .

Replacing the default logo in the custom PDF static resource file

After saving a local copy of the customPDF.zip static resource file and extracting its contents to a local drive, you can then replace the default logo (logo.png) with your company logo in the customPDF.zip file.

To copy your replacement logo into the custom PDF static resource file:

- 1 Open the location to which you saved and extracted the contents of the customPDF.zip file.
- 2 Paste your replacement logo into the file location.
- 3 Right-click on your logo file and choose **Add to "customPDF.zip"**.

Note: All the files contained in the customPDF.zip file must be located at the root level. Do not create nested folders inside the customPDF.zip file. Any contents located in nested folders in the customPDF.zip file are not accessible to the Visualforce page

- 4 Optionally, delete the default logo.png file from the customPDF.zip file.
- 5 Continue to the next step of the process. See "Updating the custom PDF static resource file in Infor Back Office Connect" on page 169 .

Updating the custom PDF static resource file in Infor Back Office Connect

After adding your custom company logo to the customPDF.zip static resource file, you must update the static resource file referenced in the Infor Back Office Connect application to reference your updated customPDF.zip file.

To update the custom PDF static resource file in Infor Back Office Connect:

- 1 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Develop > Static Resources**.
- 4 In the Static Resources list, locate the customPDF static resource and click Edit to display the Static Resource Edit page.
- 5 Click **Choose File** and upload the updated customPDF.zip file.

- 6 Click **Save**.
- 7 Continue to the next step of the process. See "Updating the custom quote PDF Visualforce page to reference your custom company logo" on page 170 .

Updating the custom quote PDF Visualforce page to reference your custom company logo

The customizable QuoteToPDFPage1 Visualforce page is installed during the Custom Quote PDF Reference package installation. The QuoteToPDFPage1 Visualforce page references a temporary logo (logo.png). To complete the custom logo configuration for your quote PDFs, you must update the Visualforce page to reference the exact name of the logo you added to your updated customPDF.zip static resource file.



Caution: Modifying the Apex code for the custom quote PDF Visualforce page (QuoteToPDFPage1) requires knowledge of coding and development in the Salesforce Apex programming language. If the administrator or developer attempting to modify or update the Apex code on the Visualforce page is not familiar with coding and development in Apex code, we recommend that a qualified resource delivers the code set required for your modifications.

Note: The examples provided in these sections related to modifying properties and sections of Apex code are instructional only and are insufficient for actual implementing modifications based your actual business requirements. See Salesforce documentation for information on coding and development in the Apex programming language.

This section describes the steps required to update the custom quote PDF Visualforce page to reference your custom company logo

To the custom quote PDF Visualforce page to reference your custom company logo:

- 1 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Develop > Pages**.
- 4 In the Visualforce Pages list, locate the QuoteToPagePDF1 page and click Edit to display the Visualforce Page Edit page.
- 5 Optionally, update the Page Information section.
- 6 Click the **Visualforce Markup** tab to display the Visualforce markup code for the QuoteToPDF1 Visualforce page.
- 7 Locate this area containing the markup code defining the reference to the temporary logo (logo.png):

```
<apex:image value="{!URLFOR($Resource.customPDF, 'logo.png') }"/>
```

Note: There is only one reference to logo.png on the Visualforce page.

- 8 Overwrite the existing reference to the temporary logo ('logo.png') with the exact file name of the custom company logo added to the customPDF.zip static resource file. For, example, if the file name for your custom company logo in the customPDF.zip static resource file is "mycompany_logo.png," you must change the reference to 'logo.png' to 'yourcompany_logo.png.' For example, after making this change, the markup code is:

```
<apex:image value="{!URLFOR($Resource.customPDF, 'mycompany_logo.png')}" />
```

- 9 Click **Save**.
- 10 Continue to the next step of the process. See "Validating the custom logo is displayed in quote PDF output" on page 171 .

Validating the custom logo is displayed in quote PDF output

To validate that the custom logo is displayed in quote PDF output, generate an Infor quote document and verify that your custom company logo is displayed in the generated PDF. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Configuring Infor Back Office Connect to use the custom quote PDF Visualforce page

Infor Back Office Connect includes a default quote document template for generating PDF documents (QuoteToPDFPage). If you want to create a custom quote PDF document template based on your business requirements, you can configure Infor Back Office Connect to use a custom quote PDF Visualforce page (QuoteToPDFPage1) that is available after you install the Custom Quote PDF Reference package on your Salesforce organization.

To configure Infor Back Office Connect to use the custom quote PDF Visualforce page:

- 1 Login to Salesforce as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Integration Setup** tab.
- 4 On the **Integration Setup** tab, click [Step 6: Quote and Opp Settings](#).
- 5 Locate the Configure Quote PDF Settings section.
- 6 In the **Quote PDF URL** field, delete the existing URL (/apex/QuoteToPDFPage?id=), and then paste this URL pointing to the customizable quote PDF Visualforce page: **/apex/QuoteToPDFPage1?id=**
QuoteToPDFPage is the default Visualforce quote PDF that cannot be customized.
QuoteToPDFPage1 is the name of the of the customizable quote PDF Visualforce page.

- 7 Click **Save**. All quote PDF documents generated on the Infor Quote object will now reference the customizable QuoteToPDFPage1 Visualforce page.

Note: If you modify the original quote PDF document template, the original Infor quote document template can be recovered and reactivated by reloading the Infor Back Office Connect seed data. See "Recovering the original quote PDF document template" on page 191.

Verifying the custom PDF Visualforce page configuration

After you configure Infor Back Office Connect to use the custom quote PDF Visualforce page (QuoteToPDFPage1) verify that quote PDFs are being generated using the custom Visualforce page.

To verify the custom PDF Visualforce page configuration:

- 1 Login to Infor Back Office Connect as an Infor Back Office Connect user.
Note: You must enable Development Mode for the logged in user. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2 Create an Infor quote. See "Creating Infor quote headers".
- 3 Generate an Infor quote PDF. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*. The quote PDF document is displayed in the Create Quote PDF window.
- 4 Verify that QuoteToPDFPage1 and QuoteDocumentController1 are displayed in the lower left corner of the Create Quote PDF window.

Defining properties for the custom quote PDF Visualforce page custom.css file

Redefine properties in the custom.css file to make customizations or modification to the custom quote PDF Visualforce page (QuoteToPDFPage1). You can make these modifications to style elements in the custom.css file:

- Change the font weight of a style element
- Change the font size of a style element
- Change the defined text-transform property of a style element
- Change the background color on a table header
- Change the font family defined of a style element
- Change the text-align property of a style element
- Change font style of a style element
- Change the color of a text element
- Change the padding property of an element
- Add a section with static text to the custom quote PDF Visualforce page

- Add multiple sections to the custom quote PDF Visualforce page
- Add nested sections to the custom quote PDF Visualforce page
- Add custom fields to the custom quote PDF Visualforce page



Caution: Modifying the Apex code for the custom quote PDF Visualforce page (QuoteToPDFPage1) requires knowledge of coding and development in the Salesforce Apex programming language. If the administrator or developer attempting to modify or update the Apex code on the Visualforce page is not familiar with coding and development in Apex code, we recommend that a qualified resource delivers the code set required for your modifications.

Note: The examples provided in these sections related to modifying properties and sections of Apex code are instructional only and are insufficient for actual implementing modifications based your actual business requirements. See Salesforce documentation for information on coding and development in the Apex programming language.

Changing the font weight of a style element

This section describes the steps required to change the font weight of a style element used on your generated Infor quote PDF documents. The weight of a font defines how bold or light the font is. The heavier a font, the bolder it looks on the page.

This table displays a list of valid font-weights and their definitions:

Font weight	Definition
normal	The default standard font weight, which corresponds to 400 weight.
bold	The standard bold weight of a font face, which corresponds to 700 weight.
bolder	A darker version of the font relative to the weight inherited from the parent.
lighter	A lighter version of the font relative to the weight inherited from the parent.
100, 200, 300, 400, 500, 600, 700, 800, 900	An ordered sequence in which each number indicates a weight that is at least as dark as its predecessor.
inherit	The element is assigned the same font weight as the parent.

To change the font weight of a style element on the QuoteToPDF1 Visualforce page:

- 1 Extract the contents of the customPDF static resource .zip file to a local drive. See "Downloading the customPDF static resource file to a local drive" on page 168.
- 2 Open the file location to which you extracted the contents of the customPDF static resource .zip file.
- 3 Locate the customStyle.css file and open the file in a text editor. For example, Notepad++.

- 4 Locate the style element to modify. For example,

```
.companyName {  
font-weight:bold;  
font-size:24px; }
```

- 5 Overwrite the existing font weight with the updated font weight as necessary. For example, change "bold" to "bolder."

Note: You must use the correct font-weight syntax. Refer to the font-weight in the customStyle.css version for all options related to modifying font versions. See "Font weight syntax and definitions".

- 6 Save and close the updated customStyle.css file.

- 7 Add the updated customStyle.css to the customPDF static resource .zip file.

Note: All the files contained in the .zip file must be located at the root level. Do not create nested folders inside the .zip file. Any contents located in nested folders in the .zip file are not accessible to the Visualforce page.

- 8 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.

- 9 Select **Setup**.

- 10 In the sidebar column, select **App Setup > Develop > Static Resources**.

- 11 In the Static Resources list, locate the customPDF static resource and click [Edit](#) to display the Static Resource Edit page.

- 12 Click **Choose File** and upload the updated customPDF static resource .zip file.

- 13 Click **Save**.

- 14 Generate an Infor quote document to verify that the updated font weight of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Changing the font size of a style element

This section describes the steps required to change the font size of a style element used on your generated Infor quote PDF documents. The size of a font defines how big or small a font appears on a page.

To change the font size of a style element on the QuoteToPDF1 Visualforce page:

- 1 Extract the contents of the customPDF static resource .zip file to a local drive. See "Downloading the customPDF static resource file to a local drive" on page 168.
- 2 Open the file location to which you extracted the contents of the customPDF static resource .zip file.
- 3 Locate the customStyle.css file and open the file in a text editor. For example, Notepad++.

4 Locate the style element to modify. For example,

```
.companyName {
font-weight:bold;
font-size:24px; }
```

5 Overwrite the existing font size with the updated font size as necessary. For example, in the `font-size:24px;` style element change "24px" to "18px."

Note: The font size must be in pixel format. Verify that your updated font size includes the "px" suffix.

6 Update additional font sizes as necessary.

7 Save and close the updated `customStyle.css` file.

8 Add the updated `customStyle.css` to the `customPDF` static resource .zip file.

Note: All the files contained in the .zip file must be located at the root level. Do not create nested folders inside the .zip file. Any contents located in nested folders in the .zip file are not accessible to the Visualforce page.

9 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.

10 Select **Setup**.

11 In the sidebar column, select **App Setup > Develop > Static Resources**.

12 In the Static Resources list, locate the `customPDF` static resource and click [Edit](#) to display the Static Resource Edit page.

13 Click **Choose File** and upload the updated `customPDF` static resource .zip file.

14 Click **Save**.

15 Generate an Infor quote document to verify that the updated font size of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Changing the text-transform property of a style element

This section describes the steps required to change the text-transform property value of a style element used on your generated Infor quote PDF documents. The text-transform property is a .css file property that determines the case of a text.

This table displays a list of valid text-transform properties:

Value	Definition
none	The text case is rendered as is with no changes or transformations to case. This is the default value.
capitalize	Transforms the first character of each word to upper case.

Value	Definition
uppercase	Transforms all characters to upper case.
lowercase	Transforms all characters to lower case.
inherit	The text-transformation property of the text is inherited from the parent element.

To change the text-transform property of a style element on the QuoteToPDF1 Visualforce page:

- 1 Extract the contents of the customPDF static resource .zip file to a local drive. See "Downloading the customPDF static resource file to a local drive" on page 168.
- 2 Open the file location to which you extracted the contents of the customPDF static resource .zip file.
- 3 Locate the customStyle.css file and open the file in a text editor. For example, Notepad++.
- 4 Locate the style element to modify. For example,

```
.customerName {  
text-transform:uppercase;  
font-size:14px;
```

- 5 Overwrite the existing text-transform property with the updated font size as necessary. For example, in the `text-transform:uppercase;` style element change "uppercase" to "capitalize."
Note: You must use valid text-transform properties. See "Text-transform property values".
- 6 Update additional text-transform properties as necessary.
- 7 Save and close the updated customStyle.css file.
- 8 Add the updated customStyle.css to the customPDF static resource .zip file.
Note: All the files contained in the .zip file must be located at the root level. Do not create nested folders inside the .zip file. Any contents located in nested folders in the .zip file are not accessible to the Visualforce page.
- 9 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 10 Select **Setup**.
- 11 In the sidebar column, select **App Setup > Develop > Static Resources**.
- 12 In the Static Resources list, locate the customPDF static resource and click [Edit](#) to display the Static Resource Edit page.
- 13 Click **Choose File** and upload the updated customPDF static resource .zip file.
- 14 Click **Save**.
- 15 Generate an Infor quote document to verify that the updated text-transform property of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Changing the background color of a table header

This section describes the steps required to change the background color of a table header.

To change the background color of a table within the QuoteToPDF1 Visualforce page:

- 1 Extract the contents of the customPDF static resource .zip file to a local drive. See "Downloading the customPDF static resource file to a local drive" on page 168.
- 2 Open the file location to which you extracted the contents of the customPDF static resource .zip file.
- 3 Locate the customStyle.css file and open the file in a text editor. For example, Notepad++.
- 4 Locate the style element to modify. For example,

```
.docHeader {  
text-align:right;  
color:#984806;  
font-family: Arial,Sans-Serif;  
font-weight:bold;  
font-size:28px; }
```

- 5 Overwrite the existing color property with the updated color property as necessary. For example, in the `color:#984806;` style element change "#984806" to "#686b73."

Note: We recommend using the HEX color scheme. The specified color must begin with a hash symbol (#).

- 6 Update additional color properties as necessary.
- 7 Save and close the updated customStyle.css file.
- 8 Add the updated customStyle.css to the customPDF static resource .zip file.

Note: All the files contained in the .zip file must be located at the root level. Do not create nested folders inside the .zip file. Any contents located in nested folders in the .zip file are not accessible to the Visualforce page.

- 9 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 10 Select **Setup**.
- 11 In the sidebar column, select **App Setup > Develop > Static Resources**.
- 12 In the Static Resources list, locate the customPDF static resource and click [Edit](#) to display the Static Resource Edit page.
- 13 Click **Choose File** and upload the updated customPDF static resource .zip file.
- 14 Click **Save**.
- 15 Generate an Infor quote document to verify that the updated color property of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Changing the font family defined of a style element

This section describes the steps required to change the font family of a style element used on your generated Infor quote PDF documents. A font family consists of a set of related fonts. For example, the "Times" family includes different font sizes, styles (Roman, Italic), and weights (regular, bold).

To change the font family of a style element:

- 1 Extract the contents of the customPDF static resource .zip file to a local drive. See "Downloading the customPDF static resource file to a local drive" on page 168.
- 2 Open the file location to which you extracted the contents of the customPDF static resource .zip file.
- 3 Locate the customStyle.css file and open the file in a text editor. For example, Notepad++.
- 4 Locate the style element to modify. For example,

```
.docHeader {  
text-align:right;  
color:#984806;  
font-family: Arial,Sans-Serif;  
font-weight:bold;  
font-size:28px; }
```

- 5 Overwrite the existing font family property with the updated font family property as necessary. For example, in the `font-family: Arial,Sans-Serif;` style element change "Arial,Sans-Serif" to "Times,Sans-Serif."

Note: The actual appearance of a font depends on the browser and the fonts installed on the system.

- 6 Save and close the updated customStyle.css file.
- 7 Add the updated customStyle.css to the customPDF static resource .zip file.

Note: All the files contained in the .zip file must be located at the root level. Do not create nested folders inside the .zip file. Any contents located in nested folders in the .zip file are not accessible to the Visualforce page.

- 8 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 9 Select **Setup**.
- 10 In the sidebar column, select **App Setup > Develop > Static Resources**.
- 11 In the Static Resources list, locate the customPDF static resource and click [Edit](#) to display the Static Resource Edit page.
- 12 Click **Choose File** and upload the updated customPDF static resource .zip file.
- 13 Click **Save**.
- 14 Generate an Infor quote document to verify that the updated font weight of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Changing the text-align property of a style element

This section describes the steps required to change the text-align property of a style element used on your generated Infor quote PDF documents. A text-align property specifies the horizontal alignment of text in an element.

This table shows commonly used text alignment properties:

Value	Description
left	Aligns the text to the left.
right	Aligns the text to the right.
center	Centers the text.
justify	Stretches the lines so that each line has equal width, which is commonly used in newspapers and magazines.
inherit	The text alignment is inherited from the parent element.

To change the text-align property of a style element:

- 1 Extract the contents of the customPDF static resource .zip file to a local drive. See "Downloading the customPDF static resource file to a local drive" on page 168.
- 2 Open the file location to which you extracted the contents of the customPDF static resource .zip file.
- 3 Locate the customStyle.css file and open the file in a text editor. For example, Notepad++.
- 4 Locate the style element to modify. For example,

```
.docHeader {
text-align:right;
color:#984806;
font-family: Arial,Sans-Serif;
font-weight:bold;
font-size:28px; }
```

- 5 Overwrite the existing text-align property with the updated text-align property as necessary. For example, in the `text-align:right;` style element change "right" to "center."
- 6 Save and close the updated customStyle.css file.
- 7 Add the updated customStyle.css to the customPDF static resource .zip file.

Note: All the files contained in the .zip file must be located at the root level. Do not create nested folders inside the .zip file. Any contents located in nested folders in the .zip file are not accessible to the Visualforce page.
- 8 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 9 Select **Your name > Setup**.
- 10 In the sidebar column, select **App Setup > Develop > Static Resources**.

- 11 In the Static Resources list, locate the customPDF static resource and click [Edit](#) to display the Static Resource Edit page.
- 12 Click **Choose File** and upload the updated customPDF static resource .zip file.
- 13 Click **Save**.
- 14 Generate an Infor quote document to verify that the updated text-align property of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Changing the font style property of a style element

This section describes the steps required to change the font style property of a style element used on your generated Infor quote PDF documents. The font style property specifies text style in an element. This table shows commonly used font style properties:

Value	Description
normal	The browser displays a normal font style, which is the default font style property.
italic	The browser displays an italic font style.
oblique	The browser displays an oblique font style.
inherit	The font style is inherited from the parent element.

To change the font style property of a style element:

- 1 Extract the contents of the customPDF static resource .zip file to a local drive. See "Downloading the customPDF static resource file to a local drive" on page 168.
- 2 Open the file location to which you extracted the contents of the customPDF static resource .zip file.
- 3 Locate the customStyle.css file and open the file in a text editor.
- 4 Locate the style element to modify. For example,

```
.quotationValidUntil{
font-family: Arial,Sans-Serif;
font-style:italic;
text-decoration:underline;
text-align:right;
font-size:12px;
color:black; }
```

- 5 Overwrite the existing font style property with the updated font style property as necessary. For example, in the `font-style:italic;` style element change "italic" to "normal."
- 6 Save and close the updated customStyle.css file.
- 7 Add the updated customStyle.css to the customPDF static resource .zip file.

Note: All the files contained in the .zip file must be located at the root level. Do not create nested folders inside the .zip file. Any contents located in nested folders in the .zip file are not accessible to the Visualforce page.

- 8 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 9 Select **Setup**.
- 10 In the sidebar column, select **App Setup > Develop > Static Resources**.
- 11 In the Static Resources list, locate the customPDF static resource and click [Edit](#) to display the Static Resource Edit page.
- 12 Click **Choose File** and upload the updated customPDF static resource .zip file.
- 13 Click **Save**.
- 14 Generate an Infor quote document to verify that the updated the font style property of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Changing the color of a text element

This section describes the steps required to change the color of a text element used on your generated Infor quote PDF documents. The font style property specifies text style in an element.

The CSS Color Values table contains a complete list of possible color values. CSS colors can be specified by these methods:

- Hexadecimal colors, which are supported by all major browsers
- RGB colors
- RGBA colors
- HSL colors
- HSLA colors
- Predefined/cross-browser color names

To change the color of a text element:

- 1 Extract the contents of the customPDF static resource .zip file to a local drive. See "Downloading the customPDF static resource file to a local drive" on page 168.
- 2 Open the file location to which you extracted the contents of the customPDF static resource .zip file.
- 3 Locate the customStyle.css file and open the file in a text editor.
- 4 Locate the style element to modify. For example,

```
.quotationValidUntil{  
font-family: Arial,Sans-Serif;  
font-style:italic;  
text-decoration:underline;
```

```
text-align:right;
font-size:12px;
color:black; }
```

- 5 Overwrite the existing font style property with the updated font style property as necessary. For example, in the `color:black;` style element change "black" to "white."
- 6 Save and close the updated `customStyle.css` file.
- 7 Add the updated `customStyle.css` to the `customPDF` static resource .zip file.
Note: All the files contained in the .zip file must be located at the root level. Do not create nested folders inside the .zip file. Any contents located in nested folders in the .zip file are not accessible to the Visualforce page.
- 8 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 9 Select **Setup**.
- 10 In the sidebar column, select **App Setup > Develop > Static Resources**.
- 11 In the Static Resources list, locate the `customPDF` static resource and click Edit to display the Static Resource Edit page.
- 12 Click **Choose File** and upload the updated `customPDF` static resource .zip file.
- 13 Click **Save**.
- 14 Generate an Infor quote document to verify that the updated text color is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Changing the padding property of an element

This section describes the steps required to change the padding property of an element used on your generated Infor quote PDF documents. The padding property specifies the space between the element border and the element content.

The padding shorthand property sets all the padding properties for an element in one declaration. The property can be one of these four types:

- Top padding: sets the top space above an element
- Right padding: sets the space to the right of an element
- Bottom padding: sets the space beneath an element
- Left padding: sets padding to the left of an element

This table shows valid padding settings the padding types listed above:

Value	Description
length	Specifies the padding in pixels (px), points (pt), centimeters (ct). The default value is 0px.
%	Specifies the padding percentage width of the containing element.

Value	Description
inherit	The padding is inherited from the parent element.

Note: You cannot specify a negative value for a padding property.

To change the padding property of a style element:

- 1 Extract the contents of the customPDF static resource .zip file to a local drive. See "Downloading the customPDF static resource file to a local drive" on page 168.
- 2 Open the file location to which you extracted the contents of the customPDF static resource .zip file.
- 3 Locate the customStyle.css file and open the file in a text editor.
- 4 Locate the style element to modify. For example,

```
.tHeader{
padding-right: 5px;
padding-left:3px;
background-color:#686b73;
color:white;
font-family: Arial,Sans-Serif;
font-weight:bold;
font-size:10px;
text-align:center; }
```

- 5 Overwrite the existing padding property with the updated padding property as necessary. For example, in the `padding-right: 5px;` style element change "italic" to "normal."
- 6 Save and close the updated customStyle.css file.
- 7 Add the updated customStyle.css to the customPDF static resource .zip file.

Note: All the files contained in the .zip file must be located at the root level. Do not create nested folders inside the .zip file. Any contents located in nested folders in the .zip file are not accessible to the Visualforce page.
- 8 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 9 Select **Setup**.
- 10 In the sidebar column, select **App Setup > Develop > Static Resources**.
- 11 In the Static Resources list, locate the customPDF static resource and click Edit to display the Static Resource Edit page.
- 12 Click **Choose File** and upload the updated customPDF static resource .zip file.
- 13 Click **Save**.
- 14 Generate an Infor quote document to verify that the updated the font style property of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Adding a block of static text to the QuoteToPDFPage1 Visualforce page

This section describes the steps required to add a section with static text to your generated Infor quote PDF documents. For example, you can add a section for "Terms and Conditions" or a "Legal Disclaimer" section.



Caution: Modifying the Apex code for the custom quote PDF Visualforce page (QuoteToPDFPage1) requires knowledge of coding and development in the Salesforce Apex programming language. If the administrator or developer attempting to modify or update the Apex code on the Visualforce page is not familiar with coding and development in Apex code, we recommend that a qualified resource delivers the code set required for your modifications.

Note: The examples provided in these sections related to modifying properties and sections of Apex code are instructional only and are insufficient for actual implementing modifications based your actual business requirements. See Salesforce documentation for information on coding and development in the Apex programming language.

To add a block of static text to the QuoteToPDFPage1 Visualforce page:

- 1 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Develop > Pages**.
- 4 Optionally, update the Page Information section.
- 5 Click the **Visualforce Markup** tab to display the Visualforce markup code for the QuoteToPDF1 Visualforce page.
- 6 Locate the area where you want to add the additional section with static text. This section of code displays a block of code for a table:

```
</table>

<apex:pageBlock mode="detail">
  <table width="100%" class="myTable">
    <thead class="tHeader">
      <apex:repeat value="{!$ObjectType.InForceEW__Quote__c.
FieldSets.InForceEW__QuoteDocDetailInfo}" var="Header" >
        <th><apex:outputText value="{!$ObjectType['InForce
EW__Quote__c'].Fields[Header].Label}" /></th>
      </apex:repeat>
    </thead>
    <tr>
      <apex:repeat value="{!$ObjectType.InForceEW__Quote__c.
FieldSets.InForceEW__QuoteDocDetailInfo}" var="Field" >
        <td class="tData">
          <apex:outputField value="{!InForceEW__Quote__c[Field]}
"/>
        </td>
```

```

        </apex:repeat>
    </tr>
</table>
</apex:pageBlock><br/>

```

To insert a section of static text for terms and conditions before the table header, place the cursor at the empty line between the `</table>` and `<apex:pageBlock mode="detail">` tags.

Note: When inserting a line or space for a new section or set of code, verify that the inserted line or space is completely blank. Delete any inherited code that automatically displays when you press Enter on the keyboard.

- 7 Enter this tag at the line where the cursor is located: **<apex:pageBlock title="Terms and Conditions">**
- 8 Press Enter to move to the next line of code.
- 9 Enter the static text you want to display at the line where the cursor is located. For example, **"The following terms and conditions apply to this quote:"**
- 10 After entering the desired static text, press Enter to move to the next line of code.
- 11 Enter this tag at the line where the cursor is located: **<apex:pageBlock>**
- 12 Click **Save**.
- 13 Generate an Infor quote document to verify that the updated the font style property of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Adding multiple sections to the QuoteToPDFPage1 Visualforce page

This section describes the steps required to add multiple sections to your generated Infor quote PDF documents.



Caution: Modifying the Apex code for the custom quote PDF Visualforce page (QuoteToPDFPage1) requires knowledge of coding and development in the Salesforce Apex programming language. If the administrator or developer attempting to modify or update the Apex code on the Visualforce page is not familiar with coding and development in Apex code, we recommend that a qualified resource delivers the code set required for your modifications.

Note: The examples provided in these sections related to modifying properties and sections of Apex code are instructional only and are insufficient for actual implementing modifications based your actual business requirements. See Salesforce documentation for information on coding and development in the Apex programming language.

To add multiple sections to the QuoteToPDFPage1 Visualforce page:

- 1 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2 Select **Setup**.

- 3 In the sidebar column, select **App Setup > Develop > Pages**.
- 4 Optionally, update the Page Information section.
- 5 Click the **Visualforce Markup** tab to display the Visualforce markup code for the QuoteToPDF1 Visualforce page.
- 6 Locate the area where you want to add the additional section with static text. This section of code appears at the end of the markup code.

```
<apex:outputPanel layout="block" styleClass="tDataAL">{!$Label.LBL_quoteNotification1}</apex:outputPanel><br/>
</apex:form>
</body>
</apex:page>
```

To insert multiple sections into the Visualforce page, place the cursor at the between the `</apex:outputPanel>
` and `</apex:form>` tags and press Enter to insert a new line of code.

Note: When inserting a line or space for a new section or set of code, verify that the inserted line or space is completely blank. Delete any inherited code that automatically displays when you press Enter on the keyboard.

- 7 Enter a tag for a new section at the line where the cursor is located. For example, **<apex:pageBlock title="Block Section Title">**
- 8 Press Enter to move to the next line of code.
- 9 Enter this tag at the line where the cursor is located: **<apex:pageBlock>**
- 10 Press Enter to move to the next line of code.
- 11 Enter a tag for a new section at the line where the cursor is located. For example, **<apex:pageBlock title="Block Section Title2">**
- 12 Press Enter to move to the next line of code.
- 13 Enter this tag at the line where the cursor is located: **<apex:pageBlock>**
- 14 Press Enter to move to the next line of code.
- 15 Enter a tag for a new section at the line where the cursor is located. For example, **<apex:pageBlock title="Block Section Title3">**
- 16 Enter this tag at the line where the cursor is located: **<apex:pageBlock>**
- 17 Click **Save**.
- 18 Generate an Infor quote document to verify that the updated the font style property of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Adding nested sections to the generated quote PDF

This section describes the steps required to add nested sections to the generated Infor quote PDF documents.



Caution: Modifying the Apex code for the custom quote PDF Visualforce page (QuoteToPDFPage1) requires knowledge of coding and development in the Salesforce Apex programming language. If the administrator or developer attempting to modify or update the Apex code on the Visualforce page is not familiar with coding and development in Apex code, we recommend that a qualified resource delivers the code set required for your modifications.

Note: The examples provided in these sections related to modifying properties and sections of Apex code are instructional only and are insufficient for actual implementing modifications based your actual business requirements. See Salesforce documentation for information on coding and development in the Apex programming language.

To add nested sections to the generated quote PDF:

- 1 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Develop > Pages**.
- 4 Optionally, update the Page Information section.
- 5 Click the **Visualforce Markup** tab to display the Visualforce markup code for the QuoteToPDF1 Visualforce page.
- 6 Locate the area where you want to add the additional section with static text. This section of code appears at the end of the markup code.

```
<apex:outputPanel layout="block" styleClass="tDataAL">{!$Label.LBL_quoteNotification1}</apex:outputPanel><br/>
</apex:form>
</body>
</apex:page>
```

To insert nested sections into the Visualforce page, place the cursor at the between the `</apex:outputPanel>
` and `</apex:form>` tags and press Enter to insert a new line of code.

Note: When inserting a line or space for a new section or set of code, verify that the inserted line or space is completely blank. Delete any inherited code that automatically displays when you press Enter on the keyboard.

- 7 Enter a tag for a new section at the line where the cursor is located. For example, `<apex:pageBlock title="Block Section Title">`
- 8 Press Enter to move to the next line of code.
- 9 Enter a tag for a new section at the line where the cursor is located. For example, `<apex:pageBlock title="Nested Section Title1">`
- 10 Press Enter to move to the next line of code.
- 11 Enter this tag at the line where the cursor is located: `<apex:pageBlock>`
- 12 Press Enter to move to the next line of code.
- 13 Enter a tag for a new section at the line where the cursor is located. For example, `<apex:pageBlock title="Nested Section Title2">`

14 Enter this tag at the line where the cursor is located: **<apex:pageBlock>**

15 Press Enter to move to the next line of code.

16 To close the tag containing nested sections within the `<apex:pageBlock title="Block Section Title">` level, enter this tag at the line where the cursor is located: **<apex:pageBlock>**

All of the nested sections must be contained within the `<apex:pageBlock title="Block Section Title">` tag that opens the section and the `<apex:pageBlock>` tag that closes the section. This section of code shows a sample of markup code for nested sections:

```
<apex:pageBlock title="Block Section Title">
  <apex:pageBlock title="Nested Section Title1">
    </apex:pageBlock>
    <apex:pageBlock title="Nested Section Title2">
      </apex:pageBlock>
    </apex:pageBlock>
  </apex:pageBlock>
```

17 Click **Save**.

18 Generate an Infor quote document to verify that the updated the font style property of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Adding custom fields to the generated quote PDF

This section describes the steps required to add custom fields to your generated Infor quote PDF documents.

Note: The content of this section is based on the assumption that you have added custom fields to the Infor Quote page layout. See "Infor Back Office Connect customization" on page 73.



Caution: Modifying the Apex code for the custom quote PDF Visualforce page (QuoteToPDFPage1) requires knowledge of coding and development in the Salesforce Apex programming language. If the administrator or developer attempting to modify or update the Apex code on the Visualforce page is not familiar with coding and development in Apex code, we recommend that a qualified resource delivers the code set required for your modifications.

Note: The examples provided in these sections related to modifying properties and sections of Apex code are instructional only and are insufficient for actual implementing modifications based your actual business requirements. See Salesforce documentation for information on coding and development in the Apex programming language.

To add custom fields to the generated quote PDF:

- 1** Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2** Select **Setup**.
- 3** In the sidebar column, select **App Setup > Develop > Apex Classes**.

- 4 In the Apex Classes list, locate the QuoteDocumentController1 Apex class and click [Edit](#).
- 5 Click the **Apex Class** tab to display the markup code for the QuoteDocumentController1 Apex class.
- 6 Locate the `private void retrieveQuoteLineItems()` section where you want to add the additional section with static text.

This section of markup code shows a sample of the fields retrieved for the Infor quote line items:

```
private void retrieveQuoteLineItems(){
    String query= 'Select id, InForceEW__phone__c, InForceEW__otherphone__c, InForceEW__
    fax__c, InForceEW__email__c, ' +
    ' InForceEW__billto_contactname__c, InForceEW__billtostreet1__c, In
    ForceEW__billtocity1__c, InForceEW__billtostateorprovincel__c, ' +
    ' InForceEW__billtopostalcode1__c, InForceEW__billtocountry1__c, In
    ForceEW__shipto_contactname__c, InForceEW__shiptostreet1__c, InForceEW__shiptocity1__c, InForce
    EW__shiptostateorprovincel__c, ' +
    ' InForceEW__shiptopostalcode1__c, InForceEW__shiptocountry1__c, In
    ForceEW__soldto_contactname__c, InForceEW__soldtostreet1__c, InForceEW__soldtocity1__c, InForce
    EW__soldtostateorprovincel__c, ' +
    ' InForceEW__soldtopostalcode1__c, InForceEW__soldtocountry1__c, In
    ForceEW__quotetename__c, InForceEW__quotetostreet1__c, InForceEW__quotetocity1__c, InForceEW__
    quotetostateorprovincel__c, InForceEW__quotetopostalcode1__c, InForceEW__quotetocountry1__c, '
    +
    ' (Select Name, InForceEW__quantity__c, InForceEW__totalamount__c,
    InForceEW__unitprice__c, InForceEW__productid__c, InForceEW__productcode__c, InForceEW__
    productdescription__c, InForceEW__discount__c, ' +
    ' InForceEW__listPrice__c, InForceEW__subtotal__c, InForceEW__total
    Price__c' +
    ' From InForceEW__quote__quoteLineItems__r) From InForceEW__quote__
    c where id= \'' + String.escapeSingleQuotes(quoteRecord.id) + '\'';
    list<InForceEW__quote__c> lstQuote = null; //DBManager.getSObjects(query);
    if(lstQuote != null && lstQuote.size() > 0 ){
        quot = lstQuote[0];
        newQuoteLines = lstQuote[0].InForceEW__quote__quoteLineItems__r;
    }
}
```

- 7 To add a custom field, position your cursor in the place where you want the custom field to be added. For example, position the cursor after the comma in `InForceEW__billto_contactname__c`, and before the `InForceEW__billtostreet1__c` field.
- 8 Enter the exact API name of the custom field in the place where the cursor is positioned. For example, enter **TestQuoteField__c**.

This sample markup shows the newly added custom field `TestQuoteField__c`, in bold font:

```
InForceEW__billto_contactname__c, TestQuoteField__c, InForceEW__
billtostreet1__c,
```

- 9 Repeat steps 7-8 for each custom field to add.
- 10 Click **Save**.
- 11 Generate an Infor quote document to verify that the updated the font style property of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Adding custom field sets to the generated quote PDF

This section describes the steps required to add custom field sets to your generated Infor quote PDF documents.

Note: The content of this section is based on the assumption that you have added custom field sets to the Infor Quote page layout. See "Infor Back Office Connect customization" on page 73.



Caution: Modifying the Apex code for the custom quote PDF Visualforce page (QuoteToPDFPage1) requires knowledge of coding and development in the Salesforce Apex programming language. If the administrator or developer attempting to modify or update the Apex code on the Visualforce page is not familiar with coding and development in Apex code, we recommend that a qualified resource delivers the code set required for your modifications.

Note: The examples provided in these sections related to modifying properties and sections of Apex code are instructional only and are insufficient for actual implementing modifications based your actual business requirements. See Salesforce documentation for information on coding and development in the Apex programming language.

To add custom field sets to the generated quote PDF:

- 1 Login to Salesforce as the Infor Back Office Connect user for which you enabled development mode. See "Enabling development mode for the user creating or editing Visualforce pages" on page 165.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Develop > Pages**.
- 4 Optionally, update the Page Information section.
- 5 Click the **Visualforce Markup** tab to display the Visualforce markup code for the QuoteToPDF1 Visualforce page.
- 6 Locate a section of markup code containing a field set.

This section of markup code shows a sample field set:

```
</apex:repeat>
<apex:repeat value="{!$ObjectType.InForceEW__Quote__c.FieldSets.InForceEW__QuoteDocTotal}" var=
"totalSecField" >
  <tr><td style="border:0px;" colspan="{!quoteLineFldSetNoOfClms}">&nbsp;</td>
  <td colspan="2" class="fontArial10pxblackBoldAR">
    <apex:outputLabel value="{!$ObjectType['InForceEW__Quote__c'].Fields[totalSecField].Label}"
"/>
  </td>
  <td colspan="2" class="tDataAR">
    <apex:outputField value="{!InForceEW__Quote__c[totalSecField]}"/>
  </td>
</tr>
</apex:repeat>
```

- 7 Copy the code that includes the field set to add to the clipboard.
- 8 Position your cursor in the place in the code where you want the custom field set to be added.
- 9 Press Enter to move to the next line of code.
For example, position the cursor after the closing bracket in the `</apex:repeat>` tag.

Note: When inserting a line or space for a new section or set of code, verify that the inserted line or space is completely blank. Delete any inherited code that automatically displays when you press Enter on the keyboard.

10 Paste the copied code into the markup code.

This section of markup code shows the newly copied sample field set in the markup code:

```
</apex:repeat>
<apex:repeat value="{!$ObjectType.InForceEW__Quote__c.FieldSets.InForceEW__QuoteDocTotal}" var=
"totalSecField" >
  <tr><td style="border:0px;" colspan="{!quoteLineFldSetNoOfClms}">&nbsp;</td>
  <td colspan="2" class="fontArial10pxblackBoldAR">
    <apex:outputLabel value="{!$ObjectType['InForceEW__Quote__c'].Fields[totalSecField].Label}
"/>
  </td>
  <td colspan="2" class="tDataAR">
    <apex:outputField value="{!InForceEW__Quote__c[totalSecField]}"/>
  </td>
</tr>
</apex:repeat>
</apex:repeat>
<apex:repeat value="{!$ObjectType.InForceEW__Quote__c.FieldSets.InForceEW__QuoteDocTotal}" var=
"totalSecField" >
  <tr><td style="border:0px;" colspan="{!quoteLineFldSetNoOfClms}">&nbsp;</td>
  <td colspan="2" class="fontArial10pxblackBoldAR">
    <apex:outputLabel value="{!$ObjectType['InForceEW__Quote__c'].Fields[totalSecField].Label}
"/>
  </td>
  <td colspan="2" class="tDataAR">
    <apex:outputField value="{!InForceEW__Quote__c[totalSecField]}"/>
  </td>
</tr>
</apex:repeat>
```

11 Repeat steps 7-10 for each custom field set to add.

12 Click **Save**.

13 Generate an Infor quote document to verify that the updated the font style property of the style element is displayed in the PDF output. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Recovering the original quote PDF document template

If you modify the original quote PDF document template, the original Infor quote document template can be recovered and reactivated by reloading the Infor Back Office Connect seed data.

To recover the original quote document template:

- 1 Log in to Salesforce as the system administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Integration Setup** tab.
- 4 Click [Step 1: Load Seed Data](#).
- 5 Select the **Seed Data already exists. Do you want to replace it?** check box. The page is refreshed and displays a list of these objects that will be updated:

- Message Source
 - ION Integration Configuration
 - BOD Type
 - BOD Type Version
 - Message Source BOD Type Version Junction
 - Incoterms
- 6** Click **Load Seed Data**. The status of the data loading process is displayed until the load process is complete.
- Note:** The **Load Seed Data** button does not automatically display on certain browsers. If you do not see the button, click in the grey area of the page. The page will refresh and the button will be displayed.
- 7** Click [Step 6: Quote and Opp Settings](#).
- 8** Locate the Configure Quote PDF Settings section.
- 9** In the **Quote PDF URL** field, verify that this URL is displayed: `/apex/QuoteToPDFPage?id=`
- 10** Generate a quote PDF to verify that the URL is working correctly. See "Generating an Infor quote PDF" in the *Infor Back Office Connect User Guide*.

Uninstalling the Custom Quote PDF Reference package

Uninstalling the Custom Quote PDF Reference package removes all of these package components from your Salesforce organization:

- The QuoteDocumentController1 Apex class
- The QuoteToPDFPage1 Visualforce page
- The customPDF static resource file

To uninstall the Custom Quote PDF Reference package:

- 1** Login to the Salesforce organization as the integration context user.
- 2** Select **Setup**.
- 3** In the sidebar column, select **App Setup > Installed Packages**.
- 4** In the Installed Packages section, select **Custom Quote PDF Reference** and click [Uninstall](#).
- 5** Select the **Yes, I want to uninstall this package and permanently delete all associated components** check box.
- 6** Click **Uninstall**. The package uninstallation begins. If the package is uninstalled successfully, a confirmation message is displayed. If the uninstallation fails for any reason, an error message is displayed and you must address the issue(s) identified in the error message prior to continuing.

This chapter describes the Infor Quote Migration and the tasks that you must complete to migrate all of your existing quote data residing in the standard Salesforce Quote object to the new Infor Quote object.

Note: If you have already migrated your Quotes to the Infor quote object during an upgrade or installation of a previous version of Infor Back Office Connect 10.8.x, you do not have to run the Quote Migration again for Infor Back Office Connect version 10.8.

The Quote Migration application is used to migrate your quote data from the standard Salesforce Quote object to the new Infor Quote object. The migration of all quote data residing in the standard Salesforce Quote object to the Infor Quote object is a required task in the Infor Back Office Connect version 10.8 installation and upgrade process. Install the Infor Back Office Connect Migration application and execute quote migration after you have installed or upgraded Infor Back Office Connect to version 10.8 and completed all other preliminary data migration for the Infor Back Office Connect application.

Note: If you are testing the quote migration in a Salesforce organization on which the Infor quote Migration unmanaged package was installed for Infor Back Office Connect 10.8.x, you must first uninstall the existing Infor Quote Migration unmanaged package and install the new one to complete the quote migration for Infor Back Office Connect version 10.8.



Caution: If you execute quote migration before the Infor Back Office Connect installation or upgrade to 10.8.x is complete, the migration process will fail and generate errors. To resolve these errors, you must to uninstall the Infor Quote Migration application and complete the Infor Back Office Connect installation or upgrade to version 10.8.x to successfully execute quote migration.

Before beginning the migration process

In previous versions of Infor Back Office Connect (prior to version 10.8), quotes were created and maintained on the standard Salesforce Quote object. In this Infor Back Office Connect release (version 10.8), Infor Back Office Connect extends the Salesforce quote functionality by introducing the Infor Quote object, which is a custom managed object that replaces the standard Salesforce Quote object. When Infor Back Office Connect is installed, the standard Salesforce Quote object is no longer used

for any quote-related processes. All quote data residing in the standard Salesforce Quote object must be migrated to the new Infor Quote object.

After quote migration is complete, we highly recommend that you retire usage of the standard Salesforce Quote object. We recommend the following to the Infor Back Office Connect Administrator:

- Obtain confirmation from all Infor Back Office Connect Users that their quote data was migrated completely, correctly, and is accessible from the Infor Quote tab.
- If your sales team needs to refer to the original standard Salesforce Quote data in the future, generate backup of all standard quote data for reference and archival purposes. Save the exported file to a separate location, not in your Salesforce Organization, for future access. For instance, the Infor Back Office Connect Administrator can create/run a Salesforce report to export the quote data into an Excel spreadsheet that can be accessed from a network location whenever users need to review the source data.
- The Migration process creates a copy of the standard Salesforce quote data and uses that copied data to generate new Infor Quote records on the Infor Quote object. After migration, there will be two sets of quote data in the organization: the original, “source” , standard Salesforce Quote data and the newly created “target” Infor Quote data on the Infor Quote object. If the standard and Infor Quote related lists are visible to the Infor Back Office Connect User, the Infor Back Office Connect User will see the same quote on both related lists. Given this scenario, there is a risk that Infor Back Office Connect Users may accidentally continue working with the standard Salesforce quote object when they should be working only from the Infor quote object. To mitigate this risk, we recommend that the original, source Salesforce Quote data be deleted from the organization. Also, do not display the Standard Quote related list from any page layout.

Also, if the source, standard Salesforce Quote record is synchronized with an Opportunity, after migration, the newly created Infor Quote record will also be synchronized to the same Opportunity. As stated earlier, the same quote will be accessible from the standard, Salesforce Quote object and the Infor Quote object. Record updates in this scenario can result in unexpected behavior and errors in Infor Back Office Connect. Also, Infor Back Office Connect Users may spend time updating the standard Salesforce quote record and have to re-enter their data on the Infor Quote object to leverage the features and functionality in Infor Back Office Connect.

To mitigate these risks, we highly recommend retiring the standard Salesforce Quote object and if possible deleting all standard Salesforce Quote records from the organization.

If it is not possible to delete the standard Salesforce Quote records from the organization, we recommend removal of the standard Salesforce Quote object from all Infor Back Office Connect User accessed page layouts and the only action executed on the quote record is deletion. Infor Back Office Connect Users should create and manage quotes from the Infor Quote object only. The Infor Quote object should be accessible from the Account, Contact, and Opportunity related lists as well as the Infor Quote object from the tab or All Tabs access points in Salesforce.

Infor quote migration task sequence

The following list defines the tasks to be executed by the Infor Back Office Connect Administrator. Execute each task in the order presented:

- Migration Objects: Confirm out of box Quote object and create custom migration objects to support migration of the custom object in your organization, including error messages that help Administrators understand why a record failed to migrate.
- Infor Back Office Connect Migration: Execute the migration and define general migration configuration settings.
- Migration Errors: Review and address errors generated from records that were not successfully migrated.

Overview of the quote migration process

The Infor quote migration process consists of three phases:

1 Preparing for the Infor quote migration.

See "Migrating quote data to the Infor quote object" on page 211 and "Preparing Infor Back Office Connect for the Infor quote migration" on page 211.

2 Executing the Infor quote migration.

See "Executing the initial quote data migration" on page 212.

3 Post Infor quote migration tasks.

See "Post Infor quote migration tasks" on page 213.

These sections provides an overview of the steps required to prepare for, execute, and complete the process of migrating your quote data from the standard Salesforce Quote object to the new Infor Quote object.

Preparing for the Infor quote migration checklist

This checklist includes the list of tasks that you need to complete to prepare for the Infor quote migration process. See the appropriate section of this guide for detailed instructions on how to complete these tasks.

We recommend that you complete these tasks in the order in which they are presented:

- Complete the installation or upgrade of the base Infor Back Office Connect product to version 10.8
- Complete all of the required data migration for the base Infor Back Office Connect product
- Install the Infor Back Office Connect Migration application on your Salesforce organization
- Modify any migration object or field mapping settings as necessary in the Infor Back Office Connect Migration application
- Stop the ION integration scheduler on the Integration Setup tab
- In the Step 6: Set Opportunity Default Values section of the **Integration Setup** tab, clear the **Copy Opportunity Products To Quote** check box to prevent the migration process from duplicating quote line items and opportunity products

Executing the Infor quote migration

After completing the steps listed above to prepare for the Infor Quote migration, execute the quote migration process on the **Infor Back Office Connect Migration** tab of the Infor Back Office Connect Migration application.

Note: We recommend migrating a small number of test records (10 or less) to verify that the migration is working properly purposes before attempting to migrate all of your production data.

Post Infor quote migration tasks checklist

This checklist includes the list of tasks that you need to complete after running the Infor quote migration process. See the appropriate section of this guide for detailed instructions on how to complete these tasks.

We recommend that you complete these post-migration tasks in the order in which they are presented:

- Delete the Infor Quote related workflows
- Delete sourceRecordId__c custom fields from the Infor Quote, Infor Quote Line Item, and the Quote Documents objects
- Delete the formula fields from the Quote and Quote Line Item standard objects
- Reset Infor Back Office Connect Integration settings to support regular business processes
- Reassign Infor quote and system opportunities from the default record owner to Infor Back Office Connect users
- Optionally, delete quotes owned by non-Infor Back Office Connect user from the Infor Quote object
- Manually delete all retired transaction addresses
- Optionally, re-implement any quote and opportunity triggers that were used on the Standard Salesforce Quote object prior to the quote migration for the new Infor Quote custom object

Synchronized ERP quotes and the Infor Back Office Connect Migration application

In the previous version of Infor Back Office Connect (version 10.6.x), the Infor Back Office Connect application followed Salesforce standard opportunity-quote sync (master-detail relationship) functionality. When an ERP quote is sent to Infor Back Office Connect, a system opportunity is automatically created in Infor Back Office Connect which synchronizes the inbound ERP quote.

In the current version of Infor Back Office Connect (version 10.8), the master-detail relationship of the ERP quote and opportunity has been replaced by a more flexible lookup relationship to the Opportunity object.

When ERP quotes with synchronized opportunities are migrated to the Infor Quote object using the Infor Back Office Connect Migration application, the Infor Back Office Connect Migration process replaces the master-detail relationship of the opportunity-quote with a lookup relationship. Post migration, the migrated ERP quote is related to the opportunity and synchronized.

Understanding quote record types assignments in Infor Back Office Connect version 10.8

In the current version of Infor Back Office Connect (version 10.8), significant changes have been made to the quote record type assignments for Infor Back Office Connect and ERP quotes. This table shows the differences between these quote types:

Quote	Quote type assignment in Infor Back Office Connect version 10.6.x (or earlier)	Quote type assignment in Infor Back Office Connect version 10.8
Standard Salesforce quote	No record type assigned	Infor quote
ERP quote	Infor quote	Infor ERP quote

Setting the Infor Quote record type as the default record type for the System Administrator user

All Salesforce standard quote records are migrated using the default record type assigned to the user profile. We recommend that the actual quote migration be executed by the Infor Back Office Connect Administrator profile. If the Infor quote migration is executed by users assigned to the System Administrator profile, then the default record type of the profile must be updated from the Infor ERP Quote record type to the Infor Quote record type.

In Infor Back Office Connect version 10.8, ERP quotes are assigned the Infor ERP Quote record type, while standard Salesforce quotes are not assigned a quote record type, thus the default record type must be assigned from the user. See "Understanding quote record types assignments in Infor Back Office Connect version 10.8" on page 197.

Note: The Infor Back Office Connect Migration Application should be installed by the System Administrator profile user.

To set the Infor Quote record type as the default record type for the System Administrator user:

- 1 Log in to Infor Back Office Connect as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Manage Users > Profiles**.
- 4 In the Profile list, click the [System Administrator](#) hyperlink.
- 5 In the Record Type Settings section, locate the Custom Record Type Settings.
- 6 In the Custom Record Type Settings list, locate the Infor Quote setting and click the **Edit** hyperlink to display the Edit Record Type Settings Infor Quote page.
- 7 In the **Available Record Types** list, select **Infor Quote Record Type** and click **Add** to add the record type to the **Selected Record Types** list.
- 8 In the **Selected Record Types** list, select **Infor ERP Quote Record Type** and click **Remove** to move the record type to the **Available Record Types** list.

- 9 In the Default Record Type section, select **Infor Quote Record Type** in the **Default** drop-down list to specify the Infor Quote record type as the default record type for the System Administrator user profile.
- 10 Click **Save**.

Installing the Infor Back Office Connect Migration application

This section describes the steps required to install the Infor Back Office Connect Migration.



Caution: You must complete the Infor Back Office Connect version 10.8 application installation or upgrade and complete the required data migration for the base application prior to installing and configuring the Infor Back Office Ordering application. See "Infor Back Office Connect installation" on page 29 and "Upgrading" on page 147.

To install the Infor Back Office Connect Migration:

- 1 Log into Salesforce as the system administrator.
- 2 Copy the Infor Back Office Connect Migration application installation URL from the Infor Xtreme Support site.
- 3 Paste the copied Infor Back Office Connect Migration application installation URL into the web browser of the Salesforce organization into which you are logged in as the system administrator. The Package Installation Details page is displayed.
- 4 Review the package installation details and click **Continue**. The Step 1. Approve Package API Access window is displayed.
- 5 Click **Next** without modifying any of the default settings on this page. The Step 2. Choose security level window is displayed.
- 6 Select the **Select security settings** check box. The Customize security section is displayed.
- 7 In the Profile list, locate the Infor Back Office Connect Administrator profile and select **Infor Back Office Connect Migration Administrator** from the **Access Level** drop-down list.
- 8 In the Profile list, locate the Infor Back Office Connect Developer profile and select **Infor Back Office Connect Migration Administrator** from the **Access Level** drop-down list.
- 9 Click **Next**. The Step 3. Install Package window is displayed.
- 10 Click **Install**. The application is installed and a confirmation message is displayed showing the Installed Package Details.
- 11 Select **Setup**.
- 12 In the sidebar column, select **App Setup > Installed Packages**.
- 13 Verify that the Infor Back Office Connect Migration application is displayed in the list of installed packages.

Accessing the Infor Back Office Connect Migration application

This section describes the steps required to access the Infor Back Office Connect Migration application. After installing the Infor Back Office Connect Migration application, the Infor Back Office Connect Migration application is added to the list of applications available in the Force.com App Menu. See "Navigation and user interface" in the *Infor Back Office Connect User Guide*.

To access the Infor Back Office Connect Migration application:

- 1 Log into Salesforce as the Infor Back Office Connect administrator or the Infor Back Office Connect developer.
- 2 From the Force.com App Menu select Infor Back Office Connect Migration. The Infor Back Office Connect Migration application is opened.

The Infor Back Office Connect Migration application consists of three tabs:

- **Migration Objects**
- **Infor Back Office Connect Migration**
- **Migration Errors**

When the Infor Back Office Connect Migration application is opened, the **Infor Back Office Connect Migration** tab is displayed by default.

Understanding the Infor Back Office Connect Migration application

The Infor Back Office Connect Migration application is a managed, custom Infor Back Office Connect object that consists of these tabs:

- Migration Objects

The **Migration Objects** tab is used to review the default "out-of-the-box" source objects that are included in the migration process and to create custom migration objects to contain any custom fields added to the standard Salesforce Quote object into the migration group.

- Infor Back Office Connect Migration

The **Infor Back Office Connect Migration** tab is used to execute the migration process.

- Migration Errors

The **Migration Errors** tab is used to review any errors generated during the migration process.

Working with the Migration Objects tab

The **Migration Objects** tab lists the "out-of-the-box" objects that are migrated by the Infor Back Office Connect Migration application.

Source object data is mapped to its corresponding target object. This table describes the mapping details for each migration object that appears as in the header area of the Migration Objects grid:

Field	Description
Name	The name of the migration object pairing. The migration object pair is composed of a source object and a target object. The source object is defined first and then the target object.
Source Object Name	The name of the source object referenced in the Name field.
Target Object Name	The name of the parent level source object and parent level target object affected by the migration. The source object is defined first and then the target object.
Parent Migration Object	The name of the parent level source object and parent level target object affected by the migration. The source object is defined first and then the target object.
is Active?	This check box indicates whether the migration object is currently in active use in the organization. If the is Active? check box is not selected, the migration object pair defined in the Name field is excluded from the Infor Back Office Connect Migration process.
Batch Scope Size	The Batch Scope Size field confirms that each name pairing represents a distinct batch process.

These tables show the object pairs that are migrated if you accept the "out-of-the-box" migration settings:

Attachment > Attachment	
Migration object	Attachment > Attachment
Source object	Attachment
Parent migration object (source)	Salesforce standard quote object - QUOTE
Target object	Attachment
Parent migration object (target)	Infor Back Office Connect customer quote object - In-ForceEW__Quote__c
Event > Event	
Migration object	Event > Event
Source object	Event
Parent migration object (source)	Salesforce standard quote object - QUOTE
Target object	Event

Event > Event

Parent migration object (target)	Infor Back Office Connect customer quote object - In-ForceEW__Quote__c
----------------------------------	--

Note > Note

Migration object	Note > Note
Source object	Note
Parent migration object (source)	Salesforce standard quote object - QUOTE
Target object	Note
Parent migration object (target)	Infor Back Office Connect customer quote object - In-ForceEW__Quote__c

Quote > InForceEW__Quote__c

Migration object	Quote > InForceEW__Quote__c
Source object	Quote
Parent migration object (source)	
Target object	InForceEW__Quote__c
Parent migration object (target)	

Quote Document > Attachment

Migration object	Quote Document > Attachment
Source object	Quote Document
Parent migration object (source)	Quote Document
Target object	Attachment
Parent migration object (target)	InForceEW__Quote__c

Quote Document > InForceEW__QuoteDocument__c

Migration object	Quote Document > InForceEW__QuoteDocument__c
Source object	Quote Document
Parent migration object (source)	Salesforce standard quote object - QUOTE
Target object	InForceEW__QuoteDocument__c
Parent migration object (target)	Infor Back Office Connect customer quote object - In-ForceEW__Quote__c

QuoteLineItem > InForceEW__QuoteLineItem__c	
Migration object	QuoteLineItem > InForceEW__QuoteLineItem__c
Source object	QuoteLineItem
Parent migration object (source)	Salesforce standard quote object - QUOTE
Target object	InForceEW__QuoteLineItem__c
Parent migration object (target)	Infor Back Office Connect customer quote object - In-ForceEW__Quote__c

Task > Task	
Migration object	Task > Task
Source object	Task
Parent migration object (source)	Salesforce standard quote object - QUOTE
Target object	Task
Parent migration object (target)	Infor Back Office Connect custom quote object - In-ForceEW__Quote__c

Confirming migration objects

This section describes the steps required to confirm the objects to migrate using the Infor Back Office Connect Migration application:

To confirm migration objects:

- 1 In the Infor Back Office Connect Migration application, click the **Migration Objects** tab.
- 2 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the migration objects.
- 3 Verify the list of the default migration objects.

Adding migration objects

This section describes the steps required to add migrations objects in the Infor Back Office Connect Ordering application.

If you have a custom object to migrate to Infor Back Office Connect, create the custom object in Infor Back Office Connect then create a migration object pairing to migrate the data from the source object to the target object. You can also map a custom object field to the Infor Quote object, if the field is not being used. You can only map to an object that is not part of a migration pairing.

Note: You cannot map to a target that is part of a migration pairing.

To add migration objects:

- 1 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.

- 2 Click **New** to display the Migration Object Edit page.
- 3 In the Information section, specify information for these fields:
 - In the **Source Object Name** drop-down list, select the custom object you added to Salesforce.
 - In the **Target Object Name** drop-down list, select the custom object you added to Infor Back Office Connect.
 - Optionally, click the **Parent Migration Object** lookup and select a parent object if the source and target objects are related to a parent object.
 - By default, the batch scope size is set to 1. Optionally, specify a value in the **Batch Scope Size** field based on your requirements.
 - By default, the **is Active?** check box is selected and the new objects are included in the migration process. Optionally, if you do not want this field mapping to be included in the migration process, clear the **is Active?** check box.
- 4 Click **Save**. The new migration object is created and the Migration Object Detail page is displayed.

Cloning a migration object

A migration object can be copied or cloned to create a new migration object. This process can save the Infor Back Office Connect Administrator configuration time because a currently used migration object may have very similar specifications to the new, required migration object. In this instance, a current migration object can be used as a template to create a new migration object.

This section describes the steps required to clone migration objects in the Infor Back Office Connect Ordering application:

To clone migration objects:

- 1 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.
- 2 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the migration objects.
- 3 In the Recent Migration Objects list, click the Name hyperlink of the migration object to clone to display the Migration Objects Detail page.
- 4 Click **Clone** to display the Migration Object Edit page.
- 5 In the Information Section, specify or update the information you require for the cloned migration object. See "Adding migration objects" on page 202.
- 6 Click **Save**. The cloned migration object is created and the Migration Object Detail page is displayed.

Deactivating migration object field mappings

By default, all of the "out-of-the-box" migration objects are included in the migration process. If you do not require a particular migration object for your business requirements, you can deactivate the migration object from the migration process.

This section describes the steps required to deactivate migration objects in the Infor Back Office Connect Ordering application:

To deactivate migration objects:

- 1 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.
- 2 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the migration objects.
- 3 In the Recent Migration Objects list, select the migration object to exclude and click the Edit hyperlink to display the Migration Object Edit page.
- 4 In the Information Section, clear the **is Active?** checkbox .
- 5 Click **Save**. The migration object is no longer included in the migration process.

Migration field mappings

The "out-of-the-box" migration field mappings in the Infor Back Office Connect Migration Application include a map for the **Expire On** field, which is used on ERP quotes only for both source and target objects. Infor Back Office Connect does not support the multiple source migration field maps to a single target. All migration field maps must have a one-to-one relationship.

The Salesforce standard Quote object includes the **Expiration Date** field, which does not have a defined field mapping in Infor Back Office Connect.

If you are performing an initial Infor Back Office Connect implementation (a fresh install rather than an upgrade to version 10.8), all of your quote data resides in the Salesforce standard Quote object, and if the **Expiration Date** field is required in your migration plan, the **Expiration Date** field must be mapped manually to the **Expire On** field in Infor Back Office Connect.

There are two options for mapping your **Expiration Date** field data:

- 1 Do not use the Expire On --> Expire On field map. Instead, edit the migration field map to use the Salesforce **Expiration Date** field (source) the Infor Back Office Connect version 10.8 **Expire On** field (target) or any other useful field.
- 2 Create a custom field for the **Expiration Date** field in Infor Back Office Connect, and then map the Salesforce **Expiration Date** field (source) to the **Expiration Date** custom field in Infor Back Office Connect.

Note: If you are mapping data from the Infor Back Office Connect version 10.6.x release, the "out-of-the-box" migration field mapping in Infor Back Office Connect is preset to use the **Expire On** field for both source and target. If you are mapping ERP quote data using the **Expire On** field and need to map the **Expiration Date** field data for the standard quote migration record, you must create an **Expiration Date** custom field on the Infor Quote custom object and map the **Expiration Date** field (source) from the Salesforce standard Quote object to the custom field (target).

Adding migration field mappings to a migration object

If you have a custom fields on the Standard Quote object that you want included in the migration scope, you must first add or create the custom field on the Infor Quote object, then create a migration field map for the source --> target field pairing.

Note: You cannot map to a target that is part of a migration field pairing.

This section describes the steps required to add migration field mappings to a migration object:

To add migration field mappings to a migration object:

- 1 Add the custom field to the Salesforce standard Quote object or its related objects.
- 2 Add the same field to the Infor Quote object or its related objects.
- 3 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.
- 4 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the migration objects.
- 5 In the Recent Migration Objects list, click the Name hyperlink of the migration object to clone to display the Migration Objects Detail page.
- 6 In the Migration Fields section, click **New Migration Field** to display the **Migration Field Edit** page.
- 7 In the Information section, specify information for these fields:
 - In the **Source Field Name** drop-down list, select the custom field you added to the source object.
 - In the **Target Field Name** drop-down list, select the custom field you added to the source object.

Note: The types displayed in the **Source Field Type** and the **Target Field Type** fields must match or be compatible. For example, if the source field data type is STRING, the target field data type must also be a STRING or a text field.
 - Optionally, enter a value in the **Target Default Value** field if you want the target field to automatically be populated with a default value.

Note: If the source record has a value, the source record value is copied to the target record and the value specified for the **Target Default Value** field is not used. If the source record does not have a value, the value specified for **Target Default Value** is used.
 - By default, the **Active?** check box is selected and the new field mapping is included in the migration process. Optionally, if you do not want this field mapping to be included in the migration process, clear the **Active?** check box.
 - Optionally, select the **Recreate on update** field to delete and recreate the field mapping record during future migrations. You do not need to select the **Recreate on update** check box for initial migrations. It is only valid for future migrations.
 - Optionally, select the **Concatenate?** check box to join several text strings, such as addresses, into a single text string.
 - Optionally, define a **Sequence Number** for the field mapping.
 - Optionally, select the **Updateable?** check box if you want this field mapping to be updated in future migrations. Leave the check box unselected if you do not want to update the field mapping in future migrations.
 - Optionally, specify a **Delimiter** to define a character or space to mark the beginning or end of a data element.
- 8 Click **Save**. The new field mapping is created and the Migration Field Detail page is displayed.

Accessing and editing a migration field mapping

This section describes the steps required to access and edit migration field mappings.

To access and edit a migration field mapping:

- 1 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.

- 2 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the migration objects.
- 3 In the Recent Migration Objects list, select the migration object pairing and click the [Name](#) hyperlink to display the Migration Object Edit page.
- 4 In the Migration Fields section, select the migration field pairing and click the [Edit](#) hyperlink to display the Migration Field Edit page.
- 5 In the Information section, specify or update the information you require for the field mapping. See "Adding migration field mappings to a migration object" on page 204.
- 6 Click **Save**.

Cloning a migration field mapping

A migration field mapping can be copied or cloned to create a new migration field mapping. This process can save the Infor Back Office Connect Administrator configuration time because a currently used migration field mapping may have very similar specifications to the new, required migration field mapping. In this instance, a current migration field mapping can be used as a template to create a new migration field mapping.

This section describes the steps required to clone migration field mappings:

To clone migration field mappings:

- 1 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.
- 2 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the migration objects.
- 3 In the Recent Migration Objects list, select the migration object pairing and click the [Name](#) hyperlink to display the Migration Object Edit page.
- 4 In the Migration Fields section, select the migration field pairing and click the [Name](#) hyperlink to display the Migration Field Detail page.
- 5 Click **Clone** to display the Migration Field Edit page.
- 6 In the Information Section, specify or update the information you require for the cloned field mapping. See "Adding migration field mappings to a migration object" on page 204.
- 7 Click **Save**.

Deleting a migration field mapping

This section describes the steps required to delete a migration field mapping:

To delete a migration field mapping:

- 1 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.
- 2 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the migration objects.
- 3 In the Recent Migration Objects list, select the migration object pairing and click the [Name](#) hyperlink to display the Migration Object Edit page.
- 4 In the Migration Fields section, select the migration field pairing and click the [Del](#) hyperlink. A confirmation message is displayed.
- 5 Click **OK**. The migration field mapping is deleted.

Migration record type mappings

The Infor Back Office Connect Ordering application maps the migrated fields from a source record type to a target record type. The "out-of-thebox" record type mapping is defined for each migration object.

Accessing the migration record type for a migration object

This section describes the steps required to access the migration record type mapping for a migration object.

To access the migration record type mapping for a migration object:

- 1 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.
- 2 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the migration objects.
- 3 In the Recent Migration Objects list, select the migration object pairing and click the [Name](#) hyperlink to display the Migration Object Edit page for the migration object pairing.
- 4 In the Migration Record Type Mappings section, select the migration record type field mapping and click the [Name](#) hyperlink to display the Migration Record Type Mapping Detail page.
- 5 View the migration record type mapping information. For the migration record type mapping, this information is displayed:
 - The **Name** field displays the source-to-target record type related to the migration object pairing.
 - The **Migration Object** field displays the migration object pairing (source-to-target) for the selected migration object.
 - The **Source Record Type Name** field displays the source record type related to the source object in the migration object pairing.
 - The **Target Record Type Name** field displays the target record type related to the target object in the migration object pairing.
 - If the **Active?** check box is selected, the migration record type mapping is actively in use. If the **Active?** check box is unselected, the migration record type mapping is deactivated and is not currently in use.
 - The **Created By** field displays the user and date/time stamp indicating when and by whom the migration record type mapping was created.
 - The **Last Modified By** field displays the user and date/time stamp indicating when and by whom the migration record type mapping was last updated.

Editing the migration record type for a migration object

This section describes the steps required to edit the migration record type mapping for a migration object.

To edit the migration record type mapping for a migration object:

- 1 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.
- 2 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the migration objects.

- 3 In the Recent Migration Objects list, select the migration object pairing and click the [Name](#) hyperlink to display the Migration Object Edit page for the migration object pairing.
- 4 In the Migration Record Type Mappings section, select the migration record type field mapping and click the [Edit](#) hyperlink to display the Migration Record Type Edit page.
- 5 In the Information section, specify information for these fields:
 - In the **Source Record Type** drop-down list, select a different record type. An error message is displayed if only one record type is defined for the source or target object(s).
 - In the **Target Record Type** drop-down list, select a different record type. An error message is displayed if only one record type is defined for the source or target object(s).
- 6 Click **Save**.

Cloning the migration record type for a migration object

This section describes the steps required to clone the migration record type mapping for a migration object.

To clone the migration record type mapping for a migration object:

- 1 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.
- 2 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the migration objects.
- 3 In the Recent Migration Objects list, select the migration object pairing and click the [Name](#) hyperlink to display the Migration Object Edit page for the migration object pairing.
- 4 In the Migration Record Type Mappings section, select the migration record type field mapping and click the [Name](#) hyperlink to display the Migration Record Type Mapping Detail page.
- 5 Click **Clone** to display the Migration Record Type Edit page.
- 6 In the Information Section, specify or update the information you require for the cloned migration object. See "Editing the migration record type for a migration object" on page 207.
- 7 Click **Save**.

Deleting the migration record type mapping for a migration object

This section describes the steps required to edit the migration record type mapping for a migration object.

To edit the migration record type mapping for a migration object:

- 1 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.
- 2 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the migration objects.
- 3 In the Recent Migration Objects list, select the migration object pairing and click the [Name](#) hyperlink to display the Migration Object Edit page for the migration object pairing.
- 4 In the Migration Record Type Mappings section, select the migration record type field mapping and click the [Del](#) hyperlink. A confirmation message is displayed.
- 5 Click **OK**. The migration record type mapping deleted.

Working with the Migration Errors tab

On the **Migration Errors** tab, you can create specific migration errors to accompany the migration object, migration fields, and/or migration record type mappings for the Infor Back Office Connect Ordering application. See "Migration errors" on page 224.

Creating a migration error

This section describes the steps required to create a migration error.

To create a migration error:

- 1 In the Infor Back Office Connect Ordering application, click the **Migration Objects** tab.
- 2 In the Recent Migration Errors section, click **New**.
- 3 In the Information section, specify information for these fields:
 - **Name**
 - Optionally, **Parent Object Type**.
 - In the **Migration Object** lookup, select the migration object pairing for which to create the migration error.
 - Optionally, **Error Message**
 - Optionally, **Exception Stack Trace**

Note: The **Failed Object Type** field is not used for Infor Back Office Connect version 10.8.

- 4 Click **Save**. The migration error is created and the Migration Error Detail page is displayed.

Working with the Infor Back Office Connect Migration tab

The **Infor Back Office Connect Migration** tab is only used to migrate data from the standard Salesforce Quote object to the new Infor Quote managed object.

The **Infor Back Office Connect Migration** tab consists of these two sections:

- Migration Batch Information
- Load Seed Data Information

Note: The quote migration process does not migrate or change any customizations, workflows, or triggers implemented on the standard Salesforce Quote object. After migration, all customizations, workflows, and triggers remain intact. After migration is complete, you must reimplement all your customizations, workflows, and triggers on the new Infor Quote object.

Infor quote migration and quote ownership by non-Infor Back Office Connect user profiles

When the quote migration is executed, the Infor Back Office Connect Migration application copies all standard Salesforce quotes to the new Infor Quote object, including quotes owned by non-Infor Back Office Connect users. All quotes owned by non-Infor Back Office Connect users will remain intact on the standard Salesforce Quote object, but those quotes will also be duplicated on the new Infor Quote object. This is also true when an opportunity that is the parent of a standard Salesforce quote is owned by a user assigned to the standard Salesforce user profile.

Note: A non-Infor Back Office Connect user is any user who does not consume an Infor Back Office Connect license.

We highly recommend that all users, regardless of profile, access their quotes records from the Infor Quote object only. Access to the standard, Salesforce Quote object should be restricted to the Infor Back Office Connect Administrator or Infor Back Office Connect Developer only. Also, the only action taken on standard Salesforce Quote records residing in your organization (after Infor Back Office Connect Migration) is deletion. Legacy standard, Salesforce Quote records should not be updated by any user. New quote records should not be created on the standard, Salesforce Quote object.

Migration Batch Information section

This table shows the fields in the Migration Batch Information section of The **Infor Back Office Connect Migration** tab and their descriptions:

Field	Description
Migration Object	This drop-down list displays the selected parent migration object pairing of the standard Salesforce quote object (source) and the Infor quote object (target) for the quote migration process.
Migrate only error records?	If any errors are logged during the initial migration process, you can select this check box during future migrations to correct the records and rerun the migration. When selected, the migration process will only migrate records from the error group.
Last Modified After	This date selected in this data field segregates the migration record set to include only records modified after the specified date.
Last Modified Before	This date selected in this data field segregates the migration record set to include only records modified before the specified date.
Number of Records to Migrate	Using this alpha-numeric field, the Infor Back Office Connect administrator can define a specific number of records to migrate. We recommend using this field to specify a small number of records (10 or less) to migrate for testing purposes before attempting to migrate all of your production data. When you are ready to migrate all of your production data, specify ALL for this field.

Load Seed Data Information section

This table shows the fields in the Migration Batch Information section of The **Infor Back Office Connect Migration** tab and their descriptions:

Field	Description
Namespace Prefix	This is the namespace of the Infor Back Office Connect application you are currently using.
Static Resource File Path	This is the URL pointing to the location of the seed data.

Migrating quote data to the Infor quote object

This section describes the tasks that you must complete to prepare Infor Back Office Connect for the Infor Quote migration and the execution of the initial migration of your quote data to the Infor Quote.

See "Understanding the Infor Back Office Connect Migration application" on page 199 for additional information on working with the Infor Back Office Connect Migration application to modify migration settings related to the quote migration process.

Migrating addresses on Quote records

The account's billing address (also referred to as Primary Address) is mapped to the Quote to Address fields on the Infor quote record. If the Quote contains a defined Bill-to and Ship-to role (commonly found on ERP Quotes), the Bill-to and Ship-to address fields will migrate to the appropriate Bill-to and Ship-to address fields defined in the Migration Object (Quote --> Infor quote) - Migration field map.

Preparing Infor Back Office Connect for the Infor quote migration

After completing the steps required for upgrading Infor Back Office Connect from version 10.6.x (or earlier) to version 10.8, you can run the Infor Quote migration. See "Upgrading" on page 147. This section describes the steps required to prepare Infor Back Office Connect for the Infor Quote migration.



Caution: You must complete all preliminary data migration for the base Infor Back Office Connect application as a part of the version 10.8 upgrade process prior to attempting to run the Infor Quote migration or using the Infor Back Office Connect Ordering application. See "Migrating existing data to Infor Back Office Connect version 10.8" on page 154.

To prepare Infor Back Office Connect for the Infor Quote migration:

- 1 Log into Salesforce as the Integration context user.

- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Integration Setup** tab.
- 4 On the **Integration Setup** tab, click [Step 7: Start/Stop Scheduler](#).
- 5 Click **Stop ION Integration Scheduler**. A confirmation message is displayed.



Caution: The ION integration scheduler must not be running during the migration process.

- 6 On the **Integration Setup** tab, click [Step 6: Set Opportunity Default Values](#).
- 7 Clear the **Copy Opportunity Products To Quote** check box. By unselecting this check box, you prevent the migration process from duplicating quote line items and opportunity products.

Note: If no default value is specified for the Name configuration setting in the **Name** drop-down list in the Configure System Opportunity Default Values section, all system opportunities are named using the Quote EXTID.

- 8 Click **Save**.

Executing the initial quote data migration

This section describes the steps required to execute the Infor Quote migration using the Infor Back Office Connect Migration application.

Note: Neither standard Salesforce quote or Infor quote records should be modified during the quote migration process.

To execute the initial quote data migration:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 From the Force.com App Menu select Infor Back Office Connect Migration. The Infor Back Office Connect Migration application is started and the **Infor Back Office Connect Migration** tab is displayed.
- 3 In the Migration Batch Information section, specify information for these fields:
 - In the **Migration Object** drop-down list, select **quote-->InForEW__quote__c**.
 - Optionally, specify a date in the **Last Modified After** field.
 - Optionally, specify a date in the **Last Modified Before** field.
 - Specify a value in the **Number of Records to Migrate** field. By default, the **Number of Records to Migrate** field is automatically populated with the value ALL. If you do not specify a different value for this field, the initial migration process will migrate all your product data. We recommend using this field to specify a small number of records (10 or less) to migrate for testing purposes before attempting to migrate all of your production data. When you are ready to migrate all of your production data, specify **ALL** for this field.

Note: Leave the **Migrate only error records?** check box unchecked for the initial quote data migration.

- 4 In the Load Seed Data Information section, click **Load Seed Data**. The seed data is loaded and a confirmation message is displayed above the section header.
- 5 In the Migration Batch Information section, click **Start Migration**. The status of the migration process is displayed in the section header. When the migration process is completed, a confirmation message is displayed. You can review any migration errors on the **Migration Errors** tab. Optionally, you can also check the progress of the quote migration process on the Infor Quote object. See "Infor quotes" in the *Infor Back Office Connect User Guide* for information on the Infor Quote object.

Post Infor quote migration tasks

After the migration of the quote records from the standard Salesforce Quote object to the Infor Quote object is complete and fully verified by your Infor Back Office Connect Users, Infor Back Office Connect Administrators must prepare Infor Back Office Connect for regular business functions. After completion of the post migration tasks, Infor Back Office Connect will be ready for deployment to Infor Back Office Connect Users.

After performing the initial quote migration, complete each of these post-migration tasks:

- 1 Delete all "working" objects from the organization.
 - a Delete the Infor Quote related workflows.
 - b Delete sourceRecordId__c custom fields in the Infor Quote, Infor Quote Line Item, Quote Documents, and Activity objects.
 - c Delete the formula fields from the Quote and Quote Line Item standard objects.
- 2 Reset Infor Back Office Connect Configuration - Integration settings to support regular quote and opportunity business processes.
 - a Confirm Copy Opportunity Products To Quote configuration for your organization.
 - b Confirm Opportunity Default Values for system Opportunities.
 - c Confirm Quote Clone fields/related object default values.
 - d Restart the scheduler.
- 3 Users and Quote Record Ownership.
 - a Reassign Infor quote and system opportunities from the default record owner to Infor Back Office Connect users.
- 4 Non-Infor Back Office Connect User Quote record clean-up on Infor Quote object.
 - a Optionally, delete quotes owned by non-Infor Back Office Connect user from the Infor Quote object.
- 5 Re-implement quote and opportunity triggers and workflows to support quote processes from the Infor Quote object.
- 6 Permanently delete Salesforce Quote records from the organization.
 - a Export source standard Salesforce Quote record to archive location (not in the organization).
 - b Mass delete source standard Salesforce Quote record from the organization.

Deleting all Infor Back Office Connect Migration application working objects from the organization

The Infor Back Office Connect Migration application installation created several “working” objects used by the application to facilitate the migration process. These “working” objects include workflows and fields that are no longer needed in your organization. The following tasks must be completed:

To delete all Infor Back Office Connect Migration application working objects from the organization:

- 1 Delete the Infor Quote related workflows.
- 2 Delete sourceRecordId__c custom fields from these objects:
 - Infor Quote, Infor Quote Line Item, Quote Documents, and Activity objects
- 3 Delete the formula fields from these objects:
 - Standard Salesforce Quote and Standard Salesforce Quote Line Item

Deleting workflows related to Infor quotes

This section describes the steps required to delete the workflows related to Infor quotes. The workflows related to Infor quotes have the Rule Name "Set Infor quote Issyncing."

To delete the workflows related to Infor quotes:

- 1 Log into Salesforce as the system administrator or the Infor Back Office Connect administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Create > Workflow & Approvals > Workflow Rules** to display the Understanding Workflow page.
- 4 Click **Continue** to display the All Workflow Rules page.
- 5 In the **View** list, select All Workflow Rules.
- 6 In the All Workflow Rules list, locate the workflow rule with Set Infor quote Issyncing in the **Rule Name** column.
- 7 Click the Del hyperlink next to workflow rule record. A confirmation message is displayed.
- 8 Click **OK**. The workflow rule field is deleted.
- 9 Repeat steps 6 - 8 for each workflow rule with Set Infor quote Issyncing in the **Rule Name** column.

Deleting the sourceRecordId__c custom field

After running the quote migration, you must delete the **sourceRecordId__c** custom field from these Infor Back Office Connect custom objects and activity custom fields:

- Infor quote
- Infor quote Line Item
- Quote Document
- Activity

Deleting the sourceRecordID__c custom field from the Infor quote custom object

This section describes the steps required to delete the **sourceRecordID__c** custom field from the Infor quote custom object.

To delete the **sourceRecordID__c** custom field from the Infor quote custom object:

- 1 Log into Salesforce as the system administrator or the Infor Back Office Connect administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Create > Objects** to display the Custom Objects page.
- 4 In the Custom Objects list, locate the Infor quote custom object and click the [Infor quote](#) hyperlink name to display the Custom Object Infor quote (Managed) page.
- 5 In the Custom Fields & Relationships section, locate the sourceRecordID custom field. The **Field Label** for the record is [sourceRecordID](#) and the **API Name** is sourceRecordID__c.
- 6 Click the [Del](#) hyperlink next to sourceRecordID custom field. A warning message is displayed.
- 7 Select the **Yes, I want to delete the relationship** check box.
- 8 Click **Delete**. The custom field is deleted.
- 9 Scroll to the end of the Custom Fields & Relationships section and click the [Deleted Fields](#) hyperlink. The Infor quote Deleted Fields page is displayed.
- 10 Click [Erase](#). A warning message is displayed.
- 11 Select the **Yes, I want to permanently delete the custom field** check box.
- 12 Click **Delete**. The custom field is permanently deleted.

Deleting the sourceRecordId__c custom field from the Infor quote Line Item custom object

This section describes the steps required to delete the **sourceRecordID__c** custom field from the Infor quote Line Item custom object.

To delete the **sourceRecordID__c** custom field from the Infor quote Line Item custom object:

- 1 Log into Salesforce as the system administrator or the Infor Back Office Connect administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Custom ObjectsApp Setup > Create > Objects** to display the page.
- 4 In the Custom Objects list, locate the Infor quote Line custom object and click the [Infor quote Line Item](#) hyperlink name to display the Custom Object Infor quote Line Item (Managed) page.
- 5 In the Custom Fields & Relationships section, locate the sourceRecordID custom field. The **Field Label** for the record is [sourceRecordID](#) and the **API Name** is sourceRecordID__c.
- 6 Click the [Del](#) hyperlink next to sourceRecordID custom field. A warning message is displayed.
- 7 Select the **Yes, I want to delete the relationship** check box.
- 8 Click **Delete**. The custom field is deleted.
- 9 Scroll to the end of the Custom Fields & Relationships section and click the [Deleted Fields](#) hyperlink. The Infor quote Line Item Deleted Fields page is displayed.
- 10 Click [Erase](#). A warning message is displayed.
- 11 Select the **Yes, I want to permanently delete the custom field** check box.
- 12 Click **Delete**. The custom field is permanently deleted.

Deleting the sourceRecordId__c custom field from the Quote Document custom object

This section describes the steps required to delete the **sourceRecordID__c** custom field from the Quote Document custom object.

To delete the **sourceRecordID__c** custom field from the Quote Document custom object:

- 1 Log into Salesforce as the system administrator or the Infor Back Office Connect administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Create > Objects** to display the Custom Objects page.
- 4 In the Custom Objects list, locate the Quote Document custom object and click the [Quote Document](#) hyperlink name to display the Custom Object Quote Document (Managed) page.
- 5 In the Custom Fields & Relationships section, locate the sourceRecordID custom field. The **Field Label** for the record is [sourceRecordID](#) and the **API Name** is sourceRecordID__c.
- 6 Click the [Del](#) hyperlink next to sourceRecordID custom field. A warning message is displayed.
- 7 Select the **Yes, I want to delete the relationship** check box.
- 8 Click **Delete**. The custom field is deleted.
- 9 Scroll to the end of the Custom Fields & Relationships section and click the [Deleted Fields](#) hyperlink. The Infor quote Line Item Deleted Fields page is displayed.
- 10 Click [Erase](#). A warning message is displayed.
- 11 Select the **Yes, I want to permanently delete the custom field** check box.
- 12 Click **Delete**. The custom field is permanently deleted.

Deleting the sourceRecordId__c custom field from the Activity custom fields

This section describes the steps required to delete the **sourceRecordID__c** custom field from the Activity custom fields.

To delete the **sourceRecordID__c** custom field from the Activity custom fields:

- 1 Log into Salesforce as the system administrator or the Infor Back Office Connect administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Activities > Activity Custom Fields** to display the Activity Fields page.
- 4 In the Activity Custom Fields section, locate the sourceRecordID custom field. The **Field Label** for the record is [sourceRecordID](#) and the **API Name** is sourceRecordID__c.
- 5 Click the [Del](#) hyperlink next to sourceRecordID custom field. A warning message is displayed.
- 6 Select the **Yes, I want to delete the relationship** check box.
- 7 Click **Delete**. The custom field is deleted.
- 8 Scroll to the end of the Activity Custom Fields section and click the [Deleted Fields](#) hyperlink. The Infor quote Line Item Deleted Fields page is displayed.
- 9 Click [Erase](#). A warning message is displayed.
- 10 Select the **Yes, I want to permanently delete the custom field** check box.
- 11 Click **Delete**. The custom field is permanently deleted.

Deleting the formula fields from the Quote and QuoteLineItem standard objects

After running the quote migration, you must delete these formula fields from the standard Salesforce Quote object:

- **account__c**
- **ownerId__c**
- **taxpercent__c**

You must delete these formula fields from the standard Salesforce Quote Line Item object:

- **product2__c**
- **productCode__c**

Deleting the formula fields from the standard Salesforce Quote object

This section describes the steps required to delete the **account__c**, **ownerId__c**, and **taxpercent__c** formula fields from the standard Salesforce Quote object.

To delete the formula fields from the standard Salesforce Quote object:

- 1 Log into Salesforce as the system administrator or the Infor Back Office Connect administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Quotes > Fields** to display the Quote Fields page.
- 4 In the Quote Custom Fields & Relationships section, locate the account field. The **Field Label** for the record is account and the **API Name** is **account__c**.
- 5 Click the Del hyperlink next to account custom field. A warning message is displayed.
- 6 Select the **Yes, I want to delete the custom field** check box.
- 7 Click **Delete**. The custom field is deleted.
- 8 In the Quote Custom Fields & Relationships section, locate the ownerId field. The **Field Label** for the record is ownerId and the **API Name** is **ownerId__c**.
- 9 Click the Del hyperlink next to ownerId custom field. A warning message is displayed.
- 10 Select the **Yes, I want to delete the custom field** check box.
- 11 Click **Delete**. The custom field is deleted.
- 12 In the Quote Custom Fields & Relationships section, locate the taxpercent field. The **Field Label** for the record is taxpercent and the **API Name** is **taxpercent__c**.
- 13 Click the Del hyperlink next to taxpercent custom field. A warning message is displayed.
- 14 Select the **Yes, I want to delete the custom field** check box.
- 15 Click **Delete**. The custom field is deleted.
- 16 Scroll to the end of the Quote Custom Fields & Relationships section and click the Deleted Fields hyperlink. The Quote Deleted Fields page is displayed.
- 17 Click the Erase hyperlink next to account custom field. A warning message is displayed.
- 18 Select the **Yes, I want to permanently delete the custom field** check box.
- 19 Click **Delete**. The custom field is permanently deleted.
- 20 Click the Erase hyperlink next to ownerId custom field. A warning message is displayed. A warning message is displayed.

- 21 Select the **Yes, I want to permanently delete the custom field** check box.
- 22 Click **Delete**. The custom field is permanently deleted.
- 23 Click the Erase hyperlink next to taxpercent custom field. A warning message is displayed. A warning message is displayed.
- 24 Select the **Yes, I want to permanently delete the custom field** check box.
- 25 Click **Delete**. The custom field is permanently deleted.

Deleting the formula fields from the standard Salesforce Quote Line Item object

This section describes the steps required to delete the **product2** and **productCode** formula fields from the standard Salesforce Quote Line Item object.

To delete the formula fields from the standard Salesforce Quote object:

- 1 Log into Salesforce as the system administrator or the Infor Back Office Connect administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Quotes > Quote Line Items > Fields** to display the Quote Line Items Fields page.
- 4 In the Quote Line Items Custom Fields & Relationships section, locate the **product2** field. The **Field Label** for the record is **product2** and the **API Name** is **product2__c**.
- 5 Click the Del hyperlink next to **product2** custom field. A warning message is displayed.
- 6 Select the **Yes, I want to delete the custom field** check box.
- 7 Click **Delete**. The custom field is deleted.
- 8 In the Quote Custom Fields & Relationships section, locate the **productCode** field. The **Field Label** for the record is **productCode** and the **API Name** is **productCode__c**.
- 9 Click the Del hyperlink next to ownerId custom field. A warning message is displayed.
- 10 Select the **Yes, I want to delete the custom field** check box.
- 11 Click **Delete**. The custom field is deleted.
- 12 Scroll to the end of the Quote Line Item Custom Fields & Relationships section and click the Deleted Fields hyperlink. The Quote Deleted Fields page is displayed.
- 13 Click the Erase hyperlink next to **product2** custom field. A warning message is displayed. A warning message is displayed.
- 14 Select the **Yes, I want to permanently delete the custom field** check box.
- 15 Click **Delete**. The custom field is permanently deleted.
- 16 Click the Erase hyperlink next to **productCode** custom field. A warning message is displayed. A warning message is displayed.
- 17 Select the **Yes, I want to permanently delete the custom field** check box.
- 18 Click **Delete**. The custom field is permanently deleted.
- 19 Click **Delete**. The custom field is permanently deleted.

Delete all retired transaction addresses

Additionally, because the quote migration process does not delete retired transaction address records associated with standard Salesforce quotes, after completing the data migration required for upgrading

the base Infor Back Office Connect product and running the quote migration process, you must manually delete all retired transaction address records. See Salesforce documentation.

See "Upgrading" on page 147 and "Migrating existing data to Infor Back Office Connect version 10.8" on page 154 for information on the upgrade and data migration process for the base Infor Back Office Connect product.

Re-implement any quote and opportunity triggers

Optionally, if you disabled any custom quote or opportunity triggers prior to running the quote migration process, you must re-implement the triggers for the new Infor quote custom object.

Integration settings to support regular quote and opportunity business processes

During the Infor Back Office Connect Migration application installation, Infor Back Office Connect Configuration - Integration Settings were changed to support the migration process. The following steps describe how to reset Infor Back Office Connect to support your regular quote and opportunity business processes using the Infor Quote object.

Resetting Infor Back Office Connect integration settings to support regular business processes

This section describes the steps required to reset the Infor Back Office Connect integration settings to support regular business processes for Infor Quotes.

To reset the Infor Back Office Connect integration settings to support regular business:

- 1 Log into Salesforce as the integration context user.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Integration Setup** tab.
- 4 On the **Integration Setup** tab, click [Step 6: Quote and Opp Settings](#).
- 5 Deselect the **Copy Opportunity Products To Quote** check box.

Note: There is a known issue with duplicated quotes and opportunity products copied to cloned quotes. To mitigate this issue, deselect the Copy Opportunity Products To Quote checkbox.

- 6 Optionally, in the Configure System Opportunity Default Values section, in the **Name** drop-down list, select **Name** from the available default configuration settings list.
- 7 Optionally, specify a name for system opportunities in the **Default Value** field.

Note: If you do not define a default value to name system opportunities, by default all system opportunities are named using the quote EXTID.

Note: There is a known issue related to Quote Cloning. The Reason field is populated on the cloned quote. The Reason field should be blank on cloned quotes. To mitigate this issue, follow steps 8-12.

- 8 In the Configure Quote Clone fields/related objects section, scroll to the Infor Quote – Reason field.
- 9 Click **Edit**. Scroll to the configuration fields.
- 10 Leave the **Default Value** field empty (no value).
- 11 Select the **Override** checkbox.
- 12 Click **Save**.
- 13 On the **Integration Setup** tab, click [Step 7: Start/Stop Scheduler](#).
- 14 Click **Start ION Integration Scheduler**.
A confirmation message is displayed.

Users and Quote Record ownership

During the Infor Back Office Connect Migration process, the Default Record Owner is automatically assigned as the record owner for any Infor Quotes System Opportunity when an Infor Back Office Connect User is not defined. Each Infor Quote should be assigned to an Infor Back Office Connect User. We recommend that the Infor Back Office Connect Administrator or user with administrative privileges reassign all of the records owned by the Default Record Owner to an actual Infor Back Office Connect user using the Data Loader. For smaller sets of records to reassign, you can create List views on the Infor Quote and Opportunity object to facilitate reassigning the records to the appropriate user.

Note: If the Opportunity Owner field is not displayed on the Infor Back Office Connect ERP Opportunity Layout, you must add the field to the page layout to execute this task.

To reassign a small set of Infor quote and system opportunities from the default record owner to Infor Back Office Connect users:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 From the Force.com app menu, select Infor Back Office Connect Administration.
- 3 Click the Opportunities tab to display the Opportunities Home page.
- 4 From the **View** drop-down list, select **All Opportunities** or create a specific view to list all opportunities assigned to the Default Record Owner. Click **Go!** to display a list of all opportunities based on your user permissions, security settings, and your specified search criteria.

Note: If the **Opportunities** tab list view does not include the **Opportunity Owner Alias** field in the page layout, you must add it to the page layout to execute this task.

- 5 Locate the record that is assigned to the Default Record Owner.
Note: You can click the **Opportunity Owner Alias** heading to sort the records alphabetically.
- 6 Click the **Opportunity Name** hyperlink for the record to edit.
- 7 In the **Opportunity Owner** field, click the [Change](#) hyperlink to display the Ownership Edit page.
- 8 In the **Owner** lookup, select the Infor Back Office Connect user to whom to assign ownership of the opportunity.
- 9 Optionally, select the **Send Notification Email** check box to automatically generate an e-mail to the selected user to notify the user that they are assigned as the record owner of this opportunity.
- 10 Click **Save**.

- 11 Optionally, repeat steps 5 - 10 for each record for which you need to reassign ownership to an Infor Back Office Connect user.

Reassigning ownership of ERP quotes from the default record owner to Infor Back Office Connect users

To reassign ERP quotes from the default record owner to Infor Back Office Connect users:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 From the Force.com app menu, select Infor Back Office Connect Administration.
- 3 Click the **Infor Quotes** tab to display the Infor Quotes Home page.
- 4 From the **View** drop-down list, create a specific view to list all quotes assigned to the Default Record Owner. Click **Go!** to display a list of all opportunities based on your user permissions, security settings, and your specified search criteria.

Note: If the **Infor Quotes** tab list view does not include the **Owner Alias** field in the page layout, you must add it to the page layout to execute this task.

- 5 Locate the record that is assigned to the Default Record Owner.
Note: You can click the **Owner Alias** heading to sort the records alphabetically.
- 6 Select the **Action** check box for the record for which to reassign ownership and then click **Change Owner** to display the Ownership Edit page.
- 7 In the **Owner** lookup, select the Infor Back Office Connect user to whom to assign ownership of the opportunity.
- 8 Optionally, select the **Send Notification Email** check box to automatically generate an e-mail to the selected user to notify the user that they are assigned as the record owner of this opportunity.
- 9 Click **Save**.
- 10 Optionally, repeat steps 5 - 9 for each record for which you need to reassign ownership to an Infor Back Office Connect user.

Non-Infor quote record clean-up on Infor quote object

During the Infor Back Office Connect Migration process, the Infor Back Office Connect Migration application migrates all quote records on the standard Salesforce quote object to the Infor Quote object regardless of their ownership. If your organization assigns licenses to Salesforce.com and Infor Back Office Connect licenses to users, you may have a situation where a non-Infor Back Office Connect licensed user's quotes are migrated to the Infor Quote object. If the Salesforce.com licensed user intends to continue accessing their quotes from the standard, Salesforce quote object, the following considerations must be made:

- The Salesforce.com licensed users records are now duplicated in your organization. We recommend that the Infor Back Office Connect Administrator delete the non-Infor Back Office Connect users records from the Infor Quote object to save on record space in the org and to prevent unexpected

system behavior should the record be updated in the future from both the Infor Back Office Connect and standard Salesforce venues.

- Business process must be in place to ensure that opportunities used by the Salesforce.com licensed user are not also used by Infor Back Office Connect Users. It is possible for an opportunity to be related to an Infor Quote and also have a master-detail relationship to a standard Salesforce quote object. This marriage of quotes to the Opportunity may result in unexpected system behavior or errors.
- If possible, we recommend that all individuals creating, accessing or managing quotes use the Infor Quote object. If possible, assign all users Infor Back Office Connect licenses and delete the standard Salesforce quote records after quote migration is complete and validated by the Infor Back Office Connect Users.

This section describes the steps to cleanup Non-Infor Back Office Connect User's quotes that were migrated to the Infor Quote object.

Deleting quotes that are owned by non-Infor Back Office Connect users from the Infor Quote object

We recommend that the Infor Back Office Connect Administrator or user with administrative privileges to delete quotes owned by non-Infor Back Office Connect users from the Infor Quote object using the Data Loader. For smaller sets of records to delete, you can create List views on the Infor Quote and Opportunity object to facilitate deleting the records.

Note: When you delete the non-Infor Back Office Connect User's duplicated quotes from the Infor Quote object, the original, source, standard Salesforce Quote record remains on the standard Salesforce Quote object (until the source records are deleted by the Infor Back Office Connect Administrator).

To delete quotes that are owned by non-Infor Back Office Connect users from the Quote object:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 From the Force.com app menu, select Infor Back Office Connect.
- 3 Click the **Infor Quotes** tab to display the Infor Quotes Home page.
- 4 From the **View** drop-down list, create a specific view to list all quotes assigned to the Default Record Owner. Click **Go!** to display a list of all opportunities based on your user permissions, security settings, and your specified search criteria.

Note: If the **Infor Quotes** tab list view does not include the **Owner Alias** field in the page layout, you must add it to the page layout to execute this task.

- 5 Locate the record that is assigned to the Default Record Owner.

Note: You can click the **Owner Alias** heading to sort the records alphabetically.

- 6 Select the **Action** check box for the record for which to reassign ownership and then click the **Del** hyperlink. A confirmation message is displayed.
- 7 Click **OK**. The duplicate record is deleted.
- 8 Optionally, repeat steps 5 - 7 for each duplicate record you need to delete from the Infor Quote object.

Note: The steps in this section are recommended for working with a small record set of quotes owned by non-Infor Back Office Connect users that have been copied to the Infor Quote object. If you are working with a large set of records, we recommend using the Salesforce Data Loader application to delete these records. See Salesforce documentation.

Re-implement Quote and Opportunity custom workflows, approval processes, and triggers for use with the Infor quote object

The Infor Back Office Connect Migration application does not migrate any custom workflows, approval processes, or triggers related to opportunities and quotes that may be actively used in your organization. After migration, the Infor Back Office Connect Administrator must re-implement all custom workflows, approval processes, and triggers to support regular quote processes from the Infor Back Office Connect Quote object.

Permanently delete standard Salesforce Quote records from the Salesforce Quote object

After quote migration is complete, we highly recommend that you retire usage of the standard Salesforce Quote object. All users who create, access, or manage quotes should do so from the Infor Quote object. The standard, Salesforce Quote object's access should be restricted to only the Infor Back Office Connect Administrator or Infor Back Office Connect Developer.

We recommend the following to the Infor Back Office Connect Administrator regarding the retirement of the standard Salesforce Quote object:

- Obtain confirmation from all Infor Back Office Connect Users that their quote data was migrated completely and correctly.
- If your sales team needs to refer to the original standard Salesforce Quote data in the future, generate backup of all standard quote data for reference and archival purposes. Save to a separate location, not in your Salesforce Organization, for future access. For instance, the Infor Back Office Connect Administrator can create/run a Salesforce report to export the quote data into an Excel spreadsheet that can be accessed from a network location whenever users need to review the source data.
- The Migration process creates a copy of the standard Salesforce quote data and uses that copied data to generate new Infor Quote records on the Infor Quote object. After migration, there will be two sets of quote data in the organization: the original, "source", standard Salesforce Quote data and the newly created "target" Infor Quote data on the Infor Quote object. If the standard and Infor Quote related lists are visible to the Infor Back Office Connect User, the Infor Back Office Connect User will see the same quote on both related lists. Given this scenario, there is a risk that Infor Back Office Connect Users may accidentally continue working with the standard Salesforce quote object when they should be working only from the Infor Quote object. To mitigate this risk, we recommend that the original, source Salesforce Quote data be deleted from the organization.

Also, if the source, standard Salesforce Quote record is synchronized with an Opportunity, after migration, the newly created Infor Quote record will also be synchronized to the same Opportunity. As

stated earlier, the same quote will be accessible from the standard, Salesforce Quote object and the Infor Quote object. Record updates in this scenario can result in unexpected behavior and errors in Infor Back Office Connect. Also, Infor Back Office Connect Users may spend time updating the standard Salesforce quote record and have to re-enter their data on the Infor Quote object to leverage the features and functionality in Infor Back Office Connect.

To mitigate these risks, we highly recommend retiring the standard Salesforce Quote object and if possible deleting all standard Salesforce Quote records from the organization. Use the Salesforce Data Loader to mass delete records from the standard Salesforce Quote object.

- If it is not possible to delete the standard Salesforce Quote records from the organization, we also recommend removal of the standard Salesforce Quote object from all Infor Back Office Connect User accessed page layouts and the only action executed on the quote record is deletion. Infor Back Office Connect Users should create and manage quotes from the Infor Quote object only. The Infor Quote object should be accessible from the Account, Contact, and Opportunity related lists as well as the Infor Quote object from the tab or All Tabs access points in Salesforce.

Migration errors

Review and resolve quote records that failed to migrate on the **Migration Errors** tab.

This table shows the fields displayed on the **Migration Error** tab and their descriptions:

Field	Description
Name	The migration object pairing (source --> target)
Migration Object	The active migration object defined in the Infor Back Office Connect Ordering application Migration Object listing.
Parent Record	The actual quote record that failed to migrate.
Error Message	A system-generated error message describing the issue with the quote record migration.
Parent Object Type	The object associated with the parent record.
Failed Object Type	This field is not populated during migration.
Last Modified Date	The date of the failed record migration.
Last Modified By	The user who executed the migration.

Reviewing and resolving error details for records that fail to migrate

After the initial quote migration is complete, you can review and resolve any errors that occurred with records that failed to migrate on the **Migration Errors** tab.

To review and resolve error details for records that fail to migrate:

- 1 In the Infor Back Office Connect Ordering application, click the Migration Errors tab.
- 2 From the **View** drop-down list, select **All** and then click **Go!** to display a list of all the recent migration error records.
- 3 In the Recent Migration Errors list, click the Name hyperlink of the migration object to clone to display the Migration Error Detail page.
- 4 Review the error information. See "Migration errors" on page 224.

Note: Do not attempt to resolve migration errors on the Migration Error Edit page. This page is only used to review the error messages related to the record.

- 5 Click the Parent Record hyperlink to open the record that failed to migrate.
- 6 Edit the record as necessary to resolve the issue.
- 7 Optionally, repeat steps 3 - 6 for each migration error record you need to resolve.

Rerunning the quote migration after fixing record errors

After you review and resolve any migration errors on the **Migration Errors** tab, you can rerun the migration to migrate the fixed records.

This section describes the steps required to rerun the quote migration using the Infor Back Office Connect Migration application.

Note: Neither standard Salesforce quote or Infor quote records should be modified during the quote migration process.

To rerun the quote migration after fixing record errors:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 From the Force.com App Menu select Infor Back Office Connect Migration. The Infor Back Office Connect Migration application is started and the **Infor Back Office Connect Migration** tab is displayed.
- 3 In the Migration Batch Information section, specify information for these fields:
 - In the **Migration Object** drop-down list, select **quote-->InForEW__quote__c**.
 - Select the **Migrate only error records?** check box.
 - Optionally,specify a date in the **Last Modified After** field.
 - Optionally,specify a date in the **Last Modified Before** field.
 - Specify a value in the **Number of Records to Migrate** field. By default, the **Number of Records to Migrate** field is automatically populated with the value ALL. If you do not specify a different value for this field, the initial migration process will migrate all your product data. We recommend using this field to specify a small number of records (10 or less) to migrate for testing purposes before attempting to migrate all of your production data. When you are ready to migrate all of your production data, specify **ALL** for this field.

- 4 In the Migration Batch Information section, click **Start Migration**. The status of the migration process is displayed in the section header. When the migration process is completed, a confirmation message is displayed. You can review any migration errors on the **Migration Errors** tab.

Uninstalling the Infor Back Office Connect Migration application

This section describes the steps required to uninstall the Infor Back Office Connect Ordering application from your Salesforce organization.



Caution: If you are testing the quote migration in a Salesforce organization on which the Infor Quote Migration unmanaged package was installed for Infor Back Office Connect 10.8.x, you must first uninstall the existing Infor Quote Migration unmanaged package and install the new one to complete the quote migration for Infor Back Office Connect version 10.8.

To uninstall the Infor Back Office Connect Ordering application:

- 1 Login to the Salesforce organization as the Infor Back Office Connect Administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Installed Packages**.
- 4 In the Installed Packages section, select **Infor Back Office Connect Migration** and click [Uninstall](#).
- 5 Select the **Yes, I want to uninstall this package and permanently delete all associated components** check box.
- 6 Click **Uninstall**. The package uninstallation begins. After the Infor Back Office Connect Ordering application is uninstalled successfully, a confirmation message is displayed. If the uninstallation fails for any reason, an error message is displayed and you must address the issue(s) identified in the error message prior to continuing.

This chapter describes the tasks that you must complete to uninstall Infor Back Office Connect from your Salesforce organization.

Preparing to uninstall Infor Back Office Connect

Complete these tasks before uninstalling Infor Back Office Connect:

- Login to the Salesforce organization as the integration context user
- Record any configuration information and settings associated with the Infor Back Office Connect application that you might need in the future

Note: We recommend taking screen shots of the screens containing the configuration information and settings.

- Stop the scheduler and verify that it is stopped
- Reassign standard Salesforce user profiles to Infor Back Office Connect profiles
- Delete the Infor Back Office Connect profiles
- Verify the number of accounts, contacts, opportunities, and quotes that will be affected by uninstalling the Infor Back Office Connect application and clean up the affected records to prepare for the uninstallation

Stopping the scheduler to uninstall Infor Back Office Connect

Before beginning the Infor Back Office Connect uninstallation process, you must stop the scheduler and verify that the scheduler is stopped. See "Stopping the scheduler" on page 151 and "Verifying whether the scheduler is stopped" on page 151.

Reassigning standard profiles to Infor Back Office Connect users

Before uninstalling the Infor Back Office Connect application, you must reassign standard Salesforce user profiles to all the users who were assigned the Infor Back Office Connect Administrator, Infor Back Office Connect Developer, and Infor Back Office Connect User profiles.

To reassign standard profiles to Infor Back Office Connect users:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Manage Users > Users** to display the All Users page.
- 4 Select the user profile to modify and click **Edit**.
- 5 In the **Profile** field, select a standard Salesforce profile to assign to the user.
- 6 Click **Save**.
- 7 Repeat these steps for each user assigned an Infor Back Office Connect profile.

Deleting Infor Back Office Connect profiles

After reassigning standard Salesforce user profiles to all users assigned Infor Back Office Connect profiles, delete the Infor Back Office Connect Administrator, Infor Back Office Connect Developer, and Infor Back Office Connect User profiles from your Salesforce organization.

To delete Infor Back Office Connect profiles:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Manage Users > Profiles** to display the User Profiles page.
- 4 Locate the Infor Back Office Connect user profile to delete and click **Del**. A confirmation message is displayed.
- 5 Click **OK**.
- 6 Repeat these steps for each Infor Back Office Connect profile.

Uninstalling the Infor Back Office Connect package

Before uninstalling the Infor Back Office Connect package, verify that you have completed all the prerequisite tasks required to uninstall Infor Back Office Connect. See "Preparing to uninstall Infor Back Office Connect" on page 227.

Installing Infor Back Office Connect on your Salesforce organization creates a number of custom objects, custom fields, tables, and modifications to standard Salesforce objects. Because of the parent-child relationships created by these Infor Back Office Connect custom objects, tables, and fields,

the uninstallation process will fail if the records affected by these parent-child relationships are not deleted prior to removing the Infor Back Office Connect application.

Depending on the amount of data you have in your Salesforce organization that is affected by Infor Back Office Connect, the uninstallation and data clean up process can be time-consuming and complex. Because of this, we recommend that you do not uninstall Infor Back Office Connect unless you will no longer be an Infor Back Office Connect customer in the future. If you have questions about the Infor Back Office Connect uninstallation process, contact Infor customer support. See "Contacting Infor".



Caution: Do not attempt to uninstall the Infor Back Office Connect package without stopping the scheduler and verifying that the scheduler is stopped. If the scheduler is still running, Infor Back Office Connect will continue to process records based on the scheduler settings, the installation process will fail, and transactional errors will occur. See "Stopping the scheduler" on page 151 and "Verifying whether the scheduler is stopped" on page 151.

To uninstall the Infor Back Office Connect package:

- 1 Login to the Salesforce organization as the integration context user.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Installed Packages**.
- 4 In the Installed Packages section, select **Infor Back Office Connect** and click [Uninstall](#).
- 5 Select the **Yes, I want to uninstall this package and permanently delete all associated components** check box.
- 6 Click **Uninstall**. The package uninstallation begins. If the package is uninstalled successfully, a confirmation message is displayed. If the uninstallation fails for any reason, an error message is displayed and you must address the issue(s) identified in the error message prior to continuing. After the package is uninstalled successfully, Salesforce sends an e-mail notification to the e-mail address configured in the Salesforce user profile of the installer.

Note: If you have installed other applications purchased from the Salesforce AppExchange that use or reference Infor Back Office Connect components, the Infor Back Office Connect uninstallation process might be more complex because multiple products are referencing the same components, records, and data. Sometimes, you must uninstall the additional applications referencing the Infor Back Office Connect components before you can uninstall Infor Back Office Connect.

As message processing occurs over time, the inbound and outbound message queues can become populated with large numbers of obsolete messages. Infor Back Office Connect includes the Data Management object to enable you to manage your message queues. This chapter describes concepts and tasks related to managing your messaging queues.

Understanding message processing status codes

Inbound and outbound messages are assigned status codes to indicate whether a message is in process, is processed successfully, or generated an error messages. Messages can be assigned these statuses:

- "0" indicates that the message is awaiting processing
- "1" indicates that the message processed without error
- "9" indicates that the message encountered missing dependent data in Infor Back Office Connect or contains a data related problem
- "99" indicates that a variation ID error has occurred and Infor Back Office Connect will not publish a confirmation BOD
- "999" indicates that the message generated a Salesforce run time error

Note: Inbound Sync, Show, and Acknowledge messages are sent from ERP to Infor Back Office Connect. Outbound Process and Confirm messages are sent from Infor Back Office Connect to the ERP. See "Inbound messages" on page 266 and "Outbound messages" on page 267.

A variation ID is assigned to a BOD by Infor Back Office Connect to identify the number of times a record with a specific set of attributes has been published for the accounting entity and location. The variation ID is used to ensure that Infor Back Office Connect is reading in the latest version of the BOD. For example, a BOD with a variation ID of 5 is received and read in Infor Back Office Connect. Infor Back Office Connect then receives another BOD for the same record with a variation ID of 4. Upon receiving the BOD with the variance ID of 4, this BOD is assigned a processing status of 99 to indicate that the variation ID of 4 is older then the variation ID of 5.

Marking variation conflict BODs as successful

When an older version of a BOD is received in Infor Back Office Connect, the BOD will be processed and marked as successful so that it can be automatically removed with other successful BODs.

Reprocessing inbound BODs

As inbound BODs are sent to Infor Back Office Connect, processing errors can occur due to configuration settings or missing related records (dependencies), such as a missing contact record on an account.

These failed inbound BODs must be manually reprocessed after resolving the configuration errors or the dependent objects have been loaded into Infor Back Office Connect. As a result, we recommend reprocessing all of the BODs that have been assigned 9 or 999 for their **Was Processed** status. You can verify BOD processing status on the **Inbound Messages** tab.

In some cases, BODs require dependent data to be present in Infor Back Office Connect before they can be successfully processed. For example, contacts must be defined before the CustomerParty Master BOD can reference them, or the Customer Party Master must be defined before the dependent transactions can be loaded. BODs are marked with a **Was Processed** status of 9 if the dependent data is not received prior to the retry count expiration.

If there are dependencies between BODs and the dependent BODs are delivered to Infor Back Office Connect before the parent BOD, Infor Back Office Connect will delay the processing of the dependent BOD and continue to retry processing until it locates the parent object in Infor Back Office Connect. If the parent is not found within the number of retries specified for the **Message Retry Count** field in your integration settings, the dependent BOD will not be processed and the processing status will be set to "9" to indicate that an error in processing occurred.

To reprocess BODs:

- 1 Login to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Data Management** tab.
- 4 In the Re-Process Inbound Messages section, specify information for these fields:
 - **Created After**
 - **Created Before**
- 5 In the **Inbound Message Status** field, select the **9** and/or **99** check box(es) to reprocess inbound BODs with the selected processing status(es).
- 6 In the **Re-Process Message Types** field, select the type(s) of inbound messages to reprocess. Select **ALL** to reprocess all types, or select a specific type, such as **Sync.BillToPartyMaster** to reprocess only messages of the specified type.
- 7 Click **Re-Process Messages**. A confirmation message is displayed.
- 8 Click **OK**.

Purging messages from the Infor Back Office Connect message queue

The Data Management object is used to purge obsolete inbound and outbound messages from the Infor Back Office Connect message queue based on the selected message status code(s).

Note: The Data Management object disregards messages that are marked with "0" as their status code, which indicates that the message has not been processed.

To delete messages from the Infor Back Office Connect message queue:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Data Management** tab.

Note: If the **Data Management** tab is not displayed by default, click the plus icon (+) to display all tabs and click the [Data Management](#) link in the All Tabs list.

- 4 Specify this information:

Inbound Message Status

Select the check box for each of the status code(s) to indicate which inbound messages you want to delete from the queue. You can select one or more of the status codes. For example, select the **1** and **999** check boxes to purge all inbound messages that have already been processed and inbound messages that failed due to an integration error from the queue.

Outbound Message Status

Select the check box for each of the status code(s) to indicate which outbound messages you want to delete from the queue. You can select one or more of the status codes. For example, select the **9** and **999** check boxes to purge all outbound messages that have already been processed and outbound messages that could not be processed from the queue.

- 5 Click **Delete Messages**. A confirmation message is displayed.
- 6 Click **OK**. All messages marked for deletion by the specified criteria are purged from the message queue.

Note: Do not click **OK** unless you are certain that you want to delete the messages selected for deletion. Clicking **OK** permanently deletes all of the messages in the queue matching the specified criteria and the messages cannot be recovered.

The **Logging** tab is used to configure and manage Infor Back Office Connect error logging. The errors recorded in the log can be used to investigate, interpret, debug inbound and outbound message processing errors, and reduce the amount of storage space consumed by each error. Having a log of processing errors is helpful when communicating error messages to Infor support teams. Infor support also uses the error log information to resolve support case incidents.

Note: If the **Logging** tab is not displayed by default, click the plus icon (+) to display all tabs and click the [Logging](#) link in the All Tabs list.

This chapter describes concepts and tasks related to the configuration of Infor Back Office Connect error logging and using the error logs to manage different types of logging and debugging errors.

Setting the error logging level and number of log messages

Use the Log Setup section of the **Logging** tab to configure the error logging level and maximum number of log messages.

The logging level determines the types of errors that are captured in the error log. The maximum number of log messages determines the amount of storage space consumed by each error logging level. Three log levels are currently supported in Infor Back Office Connect: Debug, Error, and Warn. This table describes the different log levels:

Log Level	Description
Debug	<p>When set to Debug, Infor Back Office Connect generates log entries for error messages and warning messages that occur during message processing.</p> <p>We recommend that you only set the log level to Debug when you are debugging an issue. After the issue is resolved, reset the log level to Error.</p>

 **Caution:** The Debug setting generates the most log entries and can create storage issues for your Salesforce organization. Use

Log Level	Description
	this log-type only when debugging and issue. Once the issue is resolved, reset the Log type to Error.
Error	When set to Error, Infor Back Office Connect only generates log entries for error messages that occur during message processing. We recommend Error as the default setting for the log level.
Warning	When set to Warning, Infor Back Office Connect only generates log entries for warning messages that occur during message processing.

To set the error logging level and number of log messages:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Logging** tab.
- 4 In the Log Setup section, specify this information:

Log Level

Select the logging level to define from the Log Level list.

Max number of log messages

The default value of log messages is 100. The maximum number of log messages should be entered as a value between 50 and 5000 based on your storage requirements.

- 5 Click **Save**.

Downloading and deleting the error log

Use the Download/Delete Logs section of the Logging tab to download or delete the error logs created by the object. You can download or delete the error log based on the message type for a specified date range.

This table describes the different log types:

Log Type	Description
Inbound	When selected, the process will compile the error log for only inbound messages.
Outbound	When selected, the process will compile the error log for only outbound messages.
Other	When selected, the process will compile the error log for any available messages that are not inbound or outbound.

Log Type	Description
All	When selected, the process will compile the error log for all available messages.

Downloading the error log

Download the error log for a specified log type and date range. You can download the file in either a comma-separated values (.csv) format or a gzip file.

To download the error log:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Logging** tab.
- 4 In the Download/Delete Logs section, select the logging type to download from the **Log Type** list.
- 5 Specify the date range to download in the **Created After** and **Created Before** fields.
- 6 Click **Download Logs**.

Deleting the error log

Delete the error log for a specified log type and date range. Deleting the logs created by the logger is helpful to clear the error logs when performing controlled debugging activities.

To delete the error log:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Logging** tab.
- 4 In the Download/Delete Logs section, select the logging type to delete from the **Log Type** list.
- 5 Specify the date range to delete in the **Created After** and **Created Before** fields.
- 6 Click **Delete Logs**.

Working with the error log list

The **Logging** tab list displays the error messages that are currently logged based on the Log Level settings. From the list, you can create a new logger, change the owner of a message, and edit and delete individual error messages.

For each error recording in the log, this information is displayed:

- The **Logger Name** field displays a unique identifier assigned to the logger record by Infor Back Office Connect. For example, a0dG0000006Yg4F.
- The **Entity** field displays the entity type of the record. For example, account.
- The **Message** field displays the actual message recorded by the log during inbound or outbound message processing.
- The **Message Type** field displays the type of message that generated the error. For example, Inbound.
- The **Related Entity URL** field displays a URL to the inbound or outbound message associated with the logger record. Clicking the link launches the corresponding inbound or outbound message detail screen.
- The **Created By** field displays the owner of the BOD. All inbound and outbound messages are created by the Integration user.
- The **Created Date** field displays the date that the message was created and added to the log.
- The **Last Modified Date** field displays the date the message was last processed.

Creating a custom logger

Create a custom logger to record or communicate information for a specific message type and entity.

To create a custom logger:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Logging** tab.
- 4 In the list view section, click **New Logger**.
- 5 Specify this information:

Logger Name

Specify a name for the custom log.

Message

Specify the log entry message to record for the message type and entity.

Message Type

Select the type of message for which to record this custom log message.

Entity

Specify the entity to associate with the custom log message.

- 6 Click **Save**.

Changing the owner of an error message

Change the owner of a logged error to reassign logs to specific users.

To change the owner of an error message:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Logging** tab.
- 4 In the list view section, select the logger to reassign and click **Change Owner**.
- 5 Specify the user to whom to reassign the logger in the **Owner** field.
- 6 Optionally, select the **Send Notification Email** check box to generate an e-mail notification to the new owner of the logger.
- 7 Click **Save**.

Editing a logger

To edit a logger:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Logging** tab.
- 4 In the list view section, select the logger to modify and click Edit.
- 5 Edit the logger information. See "Creating a custom logger" on page 238.
- 6 Click **Save**.

Deleting a logged error message

Delete a single logged error message. Deleting the logs created by the logger is helpful to clear the error logs when performing controlled debugging activities.

To delete a logger:

- 1 Log in to Salesforce as the Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Logging** tab.
- 4 In the list view section, select the logger to delete and click Delete. A confirmation message is displayed.
- 5 Click **OK**.

The **Territories** tab is used to configure and manage territories. Territories can be updated by both inbound and outbound processes. Territories can also be managed manually. When changes are made to territories in Infor Back Office Connect, the changes trigger an outbound message from Infor Back Office Connect to update ERP.

Territories are also code definitions, but territory code definition is a custom object in Infor Back Office Connect and can be synchronized both ways between ERP and Infor Back Office Connect.

If territory management is enabled in Salesforce or if the Salesforce organization is using custom territory management, then you must customize your territories by mapping the ERP territories with your existing territories. Doing so will enable you to continue using your existing territory sharing rules. Also, any changes made to territories in Infor Back Office Connect will automatically synchronize with their equivalent records in ERP.

Note: Only users with Infor Back Office Connect Administrator privileges can create or modify territories.

This chapter describes concepts and tasks related to managing territories in Infor Back Office Connect.

Viewing territories

To view territories:

- 1 Login to Salesforce as the Infor Back Office Connect administrator or Infor Back Office Connect developer.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Territories** tab.
- 4 Select **All** from the View list and click **Go!** to display the complete list of territories.
- 5 View the territory information.

Creating territories

To create territories in Infor Back Office Connect:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Territories** tab.
- 4 Click **New Territory**.
- 5 Specify the information that you require.

Note: Infor Back Office Connect includes multi-back office and multi-company features that publish BODs to different ERP accounting entities and locations based on your configuration. Ownership of new records is based on the accounting entity ID and location ID configured in the Accounting Entity Table (AET). If the multi-back office and multi-company features are configured, specify the appropriate values for the **Accounting Entity ID** and **Location ID** fields.

- 6 Click **Save**.

Note: When the record is synchronized, the **In Sync** check box is selected.

Modifying a territory

When a territory is modified or updated, Infor Back Office Connect generates an outbound message.

To modify a territory:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Click the **Territories** tab.
- 4 In the list view section, select the territory to modify and click Edit.
- 5 Edit the territory information. See "Creating territories" on page 242.

Deleting a territory

When a territory is deleted, Infor Back Office Connect generates an outbound message. Upon receipt of the outbound message, the message source (ERP) or system of record determines if the territory record is deleted. An Acknowledge BOD is then sent from the message source (ERP) to Infor Back Office Connect communicate the status of the update.

To delete a territory:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.

- 3 Click the **Territories** tab.
- 4 In the list view section, select the territory to delete and click Del. A confirmation message is displayed.
- 5 Click **OK**.

This chapter provides information on troubleshooting issues that occur in the Infor Back Office Connect application and the integration process.

Common failure scenarios

The section describes common failure scenarios that occur related to the Infor Back Office Connect integration and provides suggestions for troubleshooting and resolving these issues.

ION Adapter Connection test fails

After configuring the Infor Back Office Connect application for ERP integration, you must test the ION adapter connection to see if the configuration is successful. See "Testing the Infor Back Office Connect scheduler and scheduler connection" on page 52.

If the connection fails, there are a number of potential causes and steps you can take to resolve the issue. This table shows common causes and resolution steps:

Cause	Resolution
The remote site might not be configured properly, or the remote site is not activated.	Verify the remote site configuration and confirm that it is active. To verify the remote site configuration: <ol style="list-style-type: none">1 Login to Salesforce as the Infor Back Office Connect administrator.2 Select Setup.3 In the sidebar column, select Administration Setup > Security Controls > Remote Site Settings.4 In the Remote Site Name column, click the hyperlink of the remote site to verify.5 Verify that the remote site is configured properly and that it is active.

Cause	Resolution
	<ol style="list-style-type: none"> 6 Verify that the URL of the remote site is the same as the URL of the ION Proxy Container Endpoint URL in the Adapter Settings on the Integration Setup tab.
The remote site may be down.	Browse the ION Proxy Container Endpoint URL. If the Web Service Definition Language (WSDL) does not display, contact Infor customer support.
The username and password may be wrong.	Verify that the username and password or your ION tenant are correct in the Adapter Settings on the Integration Setup tab.
The ION Proxy Tenant may be wrong.	Verify that you have specified the ION Proxy Tenant in the Adapter Settings on the Integration Setup tab. The ION Proxy Tenant must be the same as the ION connection point settings. See "Configuring the Infor Back Office Connect adapter and scheduler settings" on page 48.
The wrong Logical ID is configured in the Infor Back Office Connect settings on the Integration Setup tab.	Verify that you have specified the correct Logical ID in the Infor Back Office Connect settings. See "Configuring Infor Back Office Connect settings" on page 45.

ION integration scheduler is down

The scheduler is the Infor Back Office Connect component that sends messages. Certain integration events can cause the scheduler to fail.

If the scheduler fails, there are a number of potential causes and steps you can take to resolve the issue. This table shows common causes and resolution steps:

Cause	Resolution
The scheduled job entry is deleted.	Restart the scheduler. See "Starting the scheduler".
The Start/Stop Scheduler button on the Integration Setup tab continually resets to "Start Ion Integration Scheduler."	<p>Delete the IONBatchExecutor job from the scheduled jobs list and restart the scheduler.</p> <p>To delete the IONBatchExecutor job from the scheduled jobs list:</p> <ol style="list-style-type: none"> 1 Login to Salesforce as the integration context user. 2 Select Setup. 3 In the sidebar column, select Administration Setup > Monitoring > Scheduled Jobs. 4 Locate the IONBatchExecutor job in the All Scheduled Jobs list and click <u>Del</u>. A confirmation message is displayed. 5 Click OK. 6 Restart the scheduler. See "Starting the scheduler".

Cause	Resolution
Apex job error: Error message: Too many code statements: 1000001	<ol style="list-style-type: none"> 1 See "Recommended Inbound Batch Scope values for initial data load" on page 33 for the recommended setting for the BOD noun being processed. 2 Change the Inbound Batch Scope setting to the recommended setting for the BOD noun being processed. See "Configuring the scheduler settings" on page 50.

Batch Apex job fails

When the scheduler messages trigger the processing of inbound and outbound, the adapter invokes a Batch Apex job to process inbound and outbound messages. Certain integration events can cause Batch Apex jobs to fail.

If a Batch Apex job fails, there are a number of potential causes and steps you can take to resolve the issue. This table shows common causes and resolution steps:

Cause	Resolution
The web service callout from the Batch Apex job can fail because the configuration settings specified in the Update Adapter Settings section of the Integration Setup tab are incorrect.	Verify that the Update Adapter Settings are correct. See "Configuring the Infor Back Office Connect adapter and scheduler settings" on page 48.
A response time out error occurred because the Infor ION Cloud server is unavailable.	Contact Infor support. See "Contacting Infor".
A failure in the Batch Apex code execution occurred.	Contact Infor support and provide them with the failure error details. Browse the apex job entries in your error log to capture the message. See "Error logging" on page 235.
First error: Web service callout failed: WebService returned a SOAP Fault: {ION User} is offline. faultcode=S:Server fault-actor=: ION User account is inactive in ION.	Activate ION User in ION.
InboundMessageBatch is not in the Apex Jobs list view	Contact Infor support.
Too many SOQL queries: 201	Decrease the Inbound Batch Scope setting in the Update Scheduler Settings section of the Integration Setup tab. See "Configuring the

Cause	Resolution
	Infor Back Office Connect adapter and scheduler settings" on page 48.

InboundMessageBatch job is not displayed in the Apex Jobs list

The Apex Jobs page lists all Batch Apex jobs that have been submitted for execution. See Salesforce documentation.

If the InboundMessageBatch job does not appear in the Apex jobs queue, you must contact Infor support. See "Contacting Infor".

To view the status of the InboundMessageBatch job, see "Verifying the status of Apex Jobs" on page 248.

OutboundMessageBatch job is not displayed in the Apex Jobs list

The OutboundMessageBatch is run on-demand when there are outbound messages with a was_process = 0 status or ionouttransactions. If you have outbound messages with either of these statuses and the OutboundMessageBatch is not displayed job does not appear in the Apex jobs queue, you must contact Infor support. See "Contacting Infor".

To view the status of the InboundMessageBatch job, see "Verifying the status of Apex Jobs" on page 248.

Verifying the status of Apex Jobs

The Apex Jobs page lists all Batch Apex jobs that have been submitted for execution. See Salesforce documentation. If the InboundMessageBatch job does not appear in the Apex jobs queue, you must contact Infor support. See "Contacting Infor".

To view the status of the InboundMessageBatch Apex job:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **Administration Setup > Jobs > Apex Jobs**.
- 4 Locate the job in the Apex Jobs list. The job names are displayed in the **Apex Class** column. For example, locate InboundMessageBatch or OutboundMessageBatch.

Inbound message processing unable to obtain exclusive access to a record

Problem: When multiple transaction BODs sharing the same account are processed by different batch jobs, BOD processing randomly fails. This issue occurs when the batch job tries to update a sales order in a single batch job and the batch job locks the parent account. When another batch job simultaneously tries to update another sales order with the same account, it cannot be updated because the account is locked. When this scenario occurs, this error is generated:

First error: Update failed. First exception on row 0 with ID a0Rd0000001OMSrEAO; first error: UNABLE_TO_LOCK_ROW, unable to obtain exclusive access to this record

Resolution: Republish the BOD.

Salesforce storage usage is over limit

Your data storage exceeds your purchased Salesforce storage limits.

Problem: This problem is often caused by leaving the Log Level set to Debug. When this scenario occurs, this error is generated:

First exception on row 0; first error: STORAGE_LIMIT_EXCEEDED, storage limit exceeded

Resolution:

- Empty the Salesforce recycling bin. See Salesforce documentation.
- Delete your error logs. See "Deleting the error log" on page 237.
- Reset the logging level to Error or Warning. See "Setting the error logging level and number of log messages" on page 235.

ION Connect and proxy tenant names do not match

Problem: If the Infor ION Connect tenant name does not match with proxy alternate tenant name in your Integration Setup settings, the integration fails. When this scenario occurs, this error is generated:

First error: Web service callout failed: WebService returned a SOAP Fault: Cannot fetch details in the given time :{Time in milliseconds} milliseconds faultcode=S:Server faultfactor=

Resolution: Verify the values specified for your Cloud tenants in the Infor Back Office Connect settings, Infor Back Office Connect Adapter, and Scheduler settings on the **Integration Setup** tab. See "Getting Infor Back office Connect logical ID and ION tenant information from Infor" on page 20, "Understanding ION Tenant Information" on page 42, and "Configuring the Infor Back Office Connect adapter and scheduler settings" on page 48.

If the proxy tenant has been created, contact Infor support to verify whether the two tenant names match.

NO_ROUTE_FOUND error

Problem: This error occurs when Infor Back Office Connect attempts to publish a BOD for which no document flow is defined in ION for the message source.

Resolution: Create a message flow in ION for the specified BOD and message source.

Account or contact record will not publish

Problem: An invalid email format was published from the system of record and the **Can Send BOD** field has been set to False.

Resolution:

Fix the email in the system of record and republish the BOD.

Common Apex error messages

The section lists common Apex error messages that occur related to the Infor Back Office Connect integration and provides suggestions for troubleshooting and resolving these issues.

Apex error message	Possible cause	Resolution
IO Exception: Unexpected end of file from server	This is frequently an ION related issue.	
Delete failed. First exception on row 0 with id a12C0000001yHW2IAM; first error: ENTITY_IS_DELETED, entity is deleted	Older inbound/outbound BODs that have been processed are automatically deleted based on the value specified for Message Expiry (in minutes) in the Configure Infor Back Office Connect Settings on the Integration Setup tab. If the related record has been manually deleted and is no longer available for automatic deletion, this error message is generated. See "Configuring Infor Back Office Connect settings" on page 45.	
IO Exception: Read timed out	This error is sometimes generated when traffic on the Infor24 Cloud servers is extremely heavy.	If this error is generated during processing, there is no issue to resolve. The affected message(s)

Apex error message	Possible cause	Resolution
		will be processed by the next Apex job.
IO Exception: Remote host closed connection during handshake	This message is generated when the on-premise ION document flow is not accessible from Infor24 Cloud, which is often the result of the ION service being restarted or is temporarily unavailable.	This message should no longer be generated when the on-premise ION service is available and Infor24 Cloud is able to connect. As a best practice, we recommend that you stop the scheduler whenever ION service is going to be unavailable to avoid the logging of this error. Once the maintenance is complete restart the scheduler. See "Stopping the scheduler" on page 151 and "Starting the scheduler".
Web service callout failed: Web-Service returned a SOAP Fault: XMPPErro connecting to 100.00.0.00:5222. fault-code=S:Server faultfactor=		
IO Exception: Unable to tunnel through proxy. Proxy returns "HTTP/1.0 404 Not Found"		
IO Exception: Unable to tunnel through proxy. Proxy returns "HTTP/1.0 503 Service Unavailable"		
Web service callout failed: Web-Service returned a SOAP Fault: iboc-00D0000000000.name@your-server.com is offline. faultcode=S:Server faultfactor=	This message is generated when the on-premise ION document flow is not accessible from Infor24 Cloud, which is often the result of the ION service being restarted or is temporarily unavailable.	We recommend deactivating the document flow in the on-premise ION desk, and then reactivating the document flow. If this does resolve the error, restart the ION service. If the issue persists, contact the Infor ION support team and log an Incident.
InForceEW:Too many query rows: 50001	This error is generated when there are more than 50001 Inbound / Outbound BODs in the Organization.	Confirm the setting of Message Expiry (in minutes) in Configure Infor Back Office Connect Settings on the Integration Setup tab. The default value of the Message Expiry (in minutes) field is 30. To reduce the number of records, you can also manually

Apex error message	Possible cause	Resolution
		<p>purge obsolete inbound and outbound messages from the Infor Back Office Connect message queue by deleting all records with a status processing code = 1. See "Purging messages from the Infor Back Office Connect message queue" on page 233.</p>
<p>Argument 1 cannot be null</p>	<p>This error is possibly related to metadata corruption.</p>	
<p>Web service callout failed: Web-Service returned a SOAP Fault: Cannot fetch details in the given time :40000 milliseconds fault-code=S:Server ...</p>	<p>This message is generated when the on-premise ION document flow is not accessible from Infor24 Cloud, which is often the result of the ION service being restarted or is temporarily unavailable.</p>	<p>This message should no longer be generated when the on-premise ION service is available and Infor24 Cloud is able to connect. As a best practice, we recommend that you stop the scheduler whenever ION service is going to be unavailable to avoid the logging of this error. Once the maintenance is complete restart the scheduler. See "Stopping the scheduler" on page 151 and "Starting the scheduler".</p>
<p>InForceEW.addressCRUD: execution of AfterUpdate caused by: System.DmlException: Update failed. First exception on row 0 with id 000000; first error: INSUFFICIENT_ACCESS_OR_READ-ONLY, insufficient access rights on object id:</p>		
<p>'InForceEW.InboundMessageBatch' : ApexBatchItems Limit exceeded.</p>	<p>Salesforce limits the number of concurrent Apex batches to 5. This message is generated if more than 5 batches are started.</p>	<p>The setting for the Total Batch Jobs field in Update Scheduler Settings in the Configure Infor Back Office Connect Adapter, Scheduler Settings section of the Integration Setup tab determines the number of batches that are started by Infor Back Office Connect. If your organization has custom Apex batch jobs, then you must reduce the number specified for the Total Batch Jobs. Infor Back Office Connect re-</p>

Apex error message	Possible cause	Resolution
		<p>quires a minimum of 2 batch jobs for incoming and outgoing BODs. The remaining 3 can be used for custom Apex batch jobs as needed. See "Configuring Infor Back Office Connect scheduler settings" on page 49 and "Configuring the scheduler settings" on page 50.</p>
<p>'InForceEW.OutboundMessage-Batch' for job id '707a000000Qb01x' : IO Exception: Error writing to server</p>		
<p>Apex script unhandled exception by user/organization: 0000000000000KD/00D000000000I84X Failed to process batch for class 'InForceEW.InboundMessage-Batch' for job id '000o0000000000o'</p>	<p>This error is generated by jobs that are stuck during processing. Salesforce limits the number of concurrent Apex batches to 5. This message is generated if more than 5 batches are started.</p>	<p>The setting for the Total Batch Jobs field in Update Scheduler Settings in the Configure Infor Back Office Connect Adapter, Scheduler Settings section of the Integration Setup tab determines the number of batches that are started by Infor Back Office Connect. If your organization has custom Apex batch jobs, then you must reduce the number specified for the Total Batch Jobs. Infor Back Office Connect requires a minimum of 2 batch jobs for incoming and outgoing BODs. The remaining 3 can be used for custom Apex batch jobs as needed. See "Configuring Infor Back Office Connect scheduler settings" on page 49 and "Configuring the scheduler settings" on page 50.</p>
<p>Too many code statements; 1000001</p>		<p>Verify the recommended Inbound Batch Scope setting for the BOD noun. See "Recommended Inbound Batch Scope values for initial data load" on page 33. Modify the Inbound Batch Scope setting in Update Scheduler Settings in the Configure Infor Back Office Connect Adapter, Scheduler Settings section of the Inte-</p>

Apex error message	Possible cause	Resolution
		gration Setup tab. See "Configuring the scheduler settings" on page 50.

Setting the Infor Back Office Connect Opportunity page layouts for the Opportunity layout master record type

Due to an issue in Salesforce, the Infor Back Office Connect Opportunity and Infor Back Office Connect ERP Opportunity page layouts are not being set as the page layout for the Opportunity Layout master record during the installation of the Infor Back Office Connect package. As a result you must manually set the Infor Back Office Connect Opportunity and Infor Back Office Connect ERP Opportunity page layouts for the Opportunity Layout master record.

Assigning the Infor Back Office Connect Opportunities page layout to the Opportunity layout master record

To assign the Infor Back Office Connect Opportunities page layout to the Opportunity layout master record:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Opportunities > Page Layouts**.
- 4 Click **Page Layout Assignment**.
- 5 Click **Edit Assignment**.
- 6 In the Profiles list, press Ctrl + Click to select the **Infor Back Office Connect Administrator**, **Infor Back Office Connect Developer**, and **Infor Back Office Connect User** profiles.
- 7 In the **Page Layout to Use** list, select **Infor Back Office Connect Opportunity Layout** for the selected profiles.
- 8 Click **Save**.

Assigning the Infor Back Office Connect ERP Opportunities page layout to the Opportunity layout master record

To assign the Infor Back Office Connect Opportunities page layout to the Opportunity layout master record:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Opportunities > Page Layouts**.
- 4 Click **Page Layout Assignment**.
- 5 Click **Edit Assignment**.
- 6 In the Profiles list, press Ctrl + Click to select the **Infor Back Office Connect Administrator**, **Infor Back Office Connect Developer**, and **Infor Back Office Connect User** profiles.
- 7 In the **Page Layout to Use** list, select **Infor Back Office Connect ERP Opportunity Layout** for the selected profiles.
- 8 Click **Save**.

Cloning ERP Quotes owned by sales users

When the Bill-to Contact owner differs from the ERP Quote owner, and the Contact has no Account reference, Salesforce generates an error message based on the ownership discrepancy violating its Security Model. In the Infor Back Office Connect v10.8 release, the user will be presented with a non-descriptive error message that simply reads: ERROR.

To resolve the ERROR, align the Bill-to Contact and ERP Quote owner and if possible, relate the Contact to an Account (also aligned with the same record owner.) A future Infor Back Office Connect release will update the error message to one that is more descriptive and user-friendly.

Increasing External ID field capacity

When you install Infor Back Office Connect, another External ID field is added to the Contact and Account objects. By default, Salesforce.com limits the number of External ID fields to seven per object. If seven External ID fields have already been defined for the Contact and Account objects in your Salesforce organization, the Infor Back Office Connect installation will fail.

To determine whether to increase the External ID field capacity for your Salesforce organization, verify the number of External ID fields you have defined for the Contact and Account objects.

If you have defined seven External ID fields for either or both the Contact and Account objects in Salesforce.com, you must log a case with Salesforce support to increase the External ID field capacity for your organization.

Verifying the number of External ID fields for the Account object

To verify the number of External ID fields for the Account object:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Accounts**.
- 4 In the Accounts section, click [Add a custom field to accounts](#) to display the Account Fields page.
- 5 In the Account Standard Fields and Account Custom Fields & Relationships sections, view the field information in the Data Type column. If a field is defined as an External ID, **(External ID)** is displayed. For example, if an External ID has been defined for the **Customer ID** field, **Text(255) (External ID) (Unique Case Insensitive)** is displayed in the Data Type column for the field.

Verifying the number of External ID fields for the Contact object

To verify the number of External ID fields for the Contact object:

- 1 Log in to Salesforce as the system administrator.
- 2 Select **Setup**.
- 3 In the sidebar column, select **App Setup > Customize > Contacts**.
- 4 In the Accounts section, click [Add a custom field to contacts](#) to display the Contact Fields page.
- 5 In the Contact Standard Fields and Contact Custom Fields & Relationships sections, view the field information in the Data Type column. If a field is defined as an External ID, **(External ID)** is displayed. For example, if an External ID has been defined for the **Customer ID** field, **Text(255) (External ID) (Unique Case Insensitive)** is displayed in the Data Type column for the field.

Understanding BODs



The information in this appendix provides an overview of functionality associated with messaging through BODs. It also introduces key terminology and concepts associated with messaging through BODs, Infor Back Office Connect, and an overview of the screens and objects used to manage BODs in the integration of Salesforce with external ERP systems using Infor Back Office Connect.

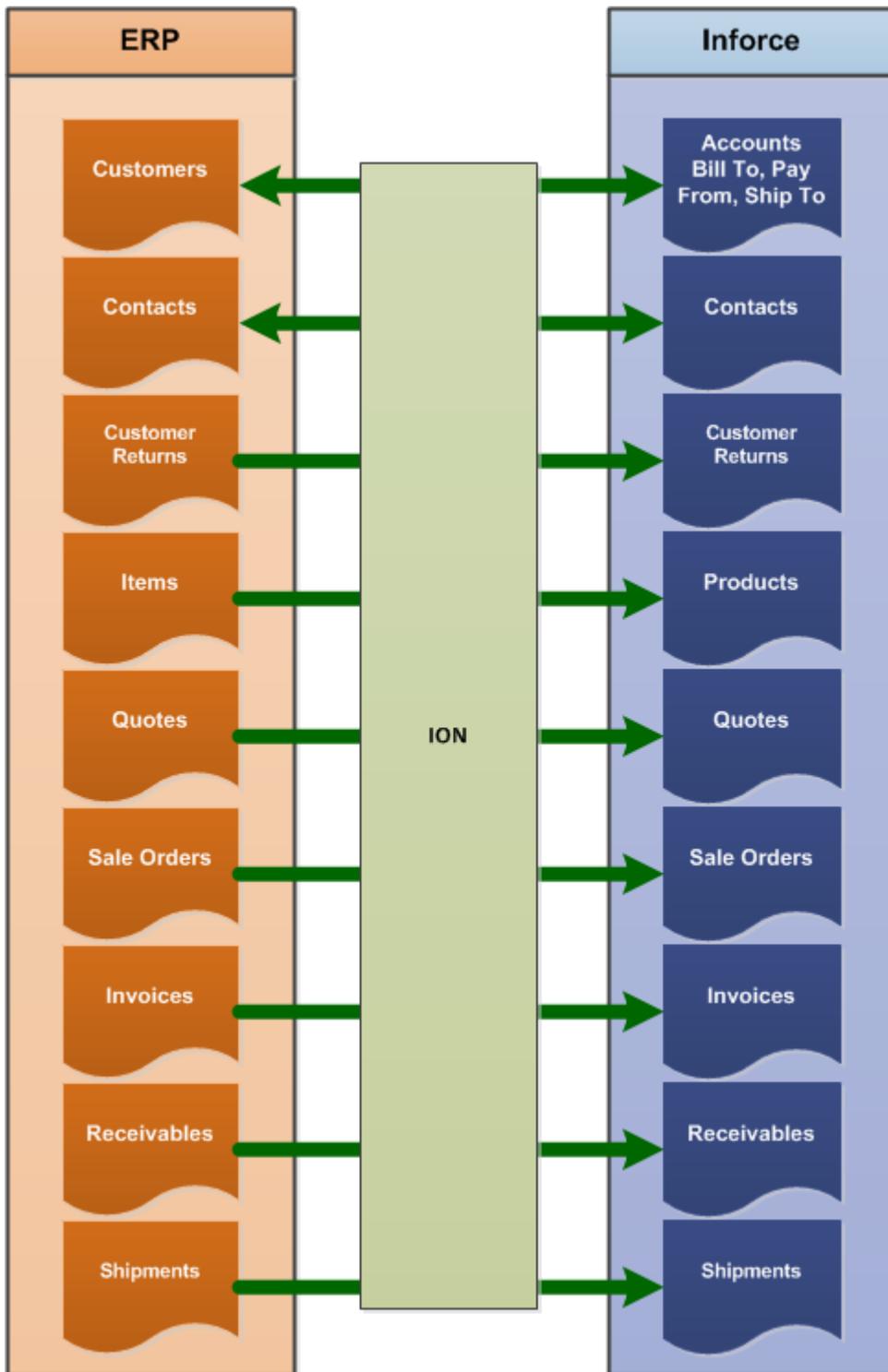
Messaging through BODs

Communications between Infor Back Office Connect and ERP are sent as business object documents (BODs) that are routed through Infor ION Connect.

Some BODs used in the Infor Back Office Connect and ERP integration support one-way communication. All one-way communication BODs flow from ERP to Infor Back Office Connect.

Other BODs also support two-way communication data flow in both directions (to and from both Infor Back Office Connect and ERP). For example, if a customer account is created or updated in Infor Back Office Connect, a ProcessCustomerPartyMaster BOD is sent to ERP. The ERP will assign a Customer Number to the Account created. As a result, the ERP sends the SyncCustomerPartyMaster BOD.

This diagram illustrates the directional message flow of BODs between Infor Back Office Connect and ERP:



Generating BODs

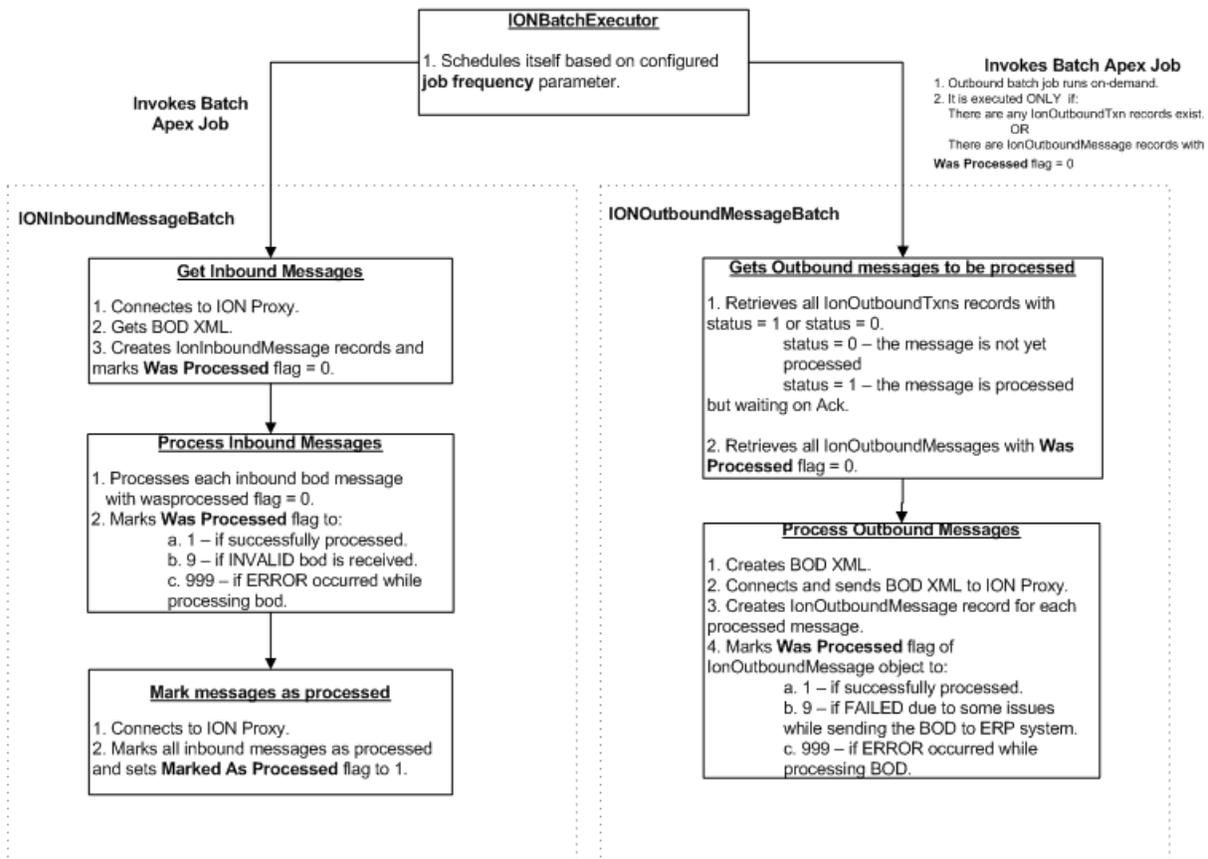
As business events or actions generate BODs, ION receives the BOD messages from the source application outbox and places them into the target application inbox.

Some examples of business events or actions that generate BODs are:

- Creating a contact
- Creating an account
- Creating a product
- Creating a ship-to or bill-to account role
- Creating or updating a ship-to address
- Creating or updating a customer type
- Creating or updating payment terms
- Creating or updating INCO terms
- Creating or updating a territory
- Creating a quote
- Converting a quote to a customer order
- Creating a sales order
- Creating a shipment
- Shipping a customer order
- Creating an invoice
- Creating or updating a receivable transaction
- Creating or posting customer payments

Understanding the execution flow of BOD processing by the Infor Back Office Connect scheduler

This diagram illustrates the directional flow of inbound and outbound Batch Apex jobs through the Infor Back Office Connect scheduler:



Posting Chatter feeds for BOD sync failure notifications

Infor Back Office Connect sends BOD sync failure notifications using Chatter. See Salesforce for information on Chatter feeds.

Note: When a BOD is processed successfully, Infor Back Office Connect does not send a Chatter notification message.

When a BOD sync failure occurs, Infor ION Connect sends an Acknowledge BOD with rejected status to Infor Back Office Connect. The BOD contains the ResponseExpressionActionCode=Rejected. Upon receipt of the BOD, Infor Back Office Connect generates a Chatter message for the Integration context user, who owns the BOD record.

The Chatter message format is: ERROR: The {Object Name} {Record Name} has failed to sync with your back office application. Details {Error Message}.

This table shows the elements of the error messages and their descriptions:

Element	Description
{Object Name}	Indicates the Infor Back Office Connect name for the BOD object. For example, the object name for the ContactPartyMaster BOD is "Contact."
{Record Name}	Indicates the name of the problem record, which contains a hyperlink to the actual record that failed to sync. For example, if the record is a contact, the record name displayed is "John Smith."
{Error Message}	Displays the actual error message returned in the BOD. If there is no error message ("identifiers: IDs_ID="), a standard message "Undefined Error, contact your system administrator" is displayed.

These are examples of error messages:

- ERROR: The Contact John Smith has failed to sync with your back office. Details: Country Code is not 2 characters.
- ERROR: The Account ACME Inc. has failed to sync with your back office. Details: Undefined Error, contact your system administrator.

Key concepts and terminology

This section provides a basic definition or explanation of key concepts and terminology related to Infor Back Office Connect and BOD messaging.

BODs

A BOD is a business object document. BODs are XML documents that are used to pass data between integrated systems. A BOD is composed of two elements, namely, a verb and a noun. The BOD's verbs and nouns are paired to execute inbound and/or outbound processes.

BOD nouns

The BOD noun describes the object or table where data resides. Infor Back Office Connect uses these nouns:

BOD Noun	Description
BillToPartyMaster	This BOD noun includes fields that indicate how the customer is billed from ERP

BOD Noun	Description
CodeDefinition	This BOD noun includes fields that load the basic default system data values required by ERP
ContactMaster	This BOD noun includes fields that create the contact record and its relationship to the customer in ERP
CustomerPartyMaster	This BOD noun includes fields that create the customer in ERP
CustomerReturn	This BOD noun includes fields that indicate how customers returns are managed in ERP
Invoice	This BOD noun includes fields that indicate how the customer is invoiced in ERP
ItemMaster	This BOD noun includes fields that describe how products are sold and maintained in the ERP
PayFromPartyMaster	This BOD noun includes fields that indicate the party responsible for paying the invoice
Quote	This BOD noun includes fields that generate quotes
ReceivableTransaction	This BOD noun includes fields that manage receivables
SalesOrder	This BOD noun includes fields related that generate/execute sales orders
ShipToPartyMaster	This BOD noun includes fields that indicate how the customer wants their purchases to be shipped
Shipment	This BOD noun includes fields that execute the shipment of goods to the customer

BOD verbs

The BOD verb describes the action to be executed relative to its associated BOD noun.

For example, SyncCodeDefinition combines the BOD Verb - Sync with the BOD Noun - CodeDefinition to create a BOD Type. Each BOD verb/noun combination or BOD Type support by Infor Back Office Connect configured for the message source is listed in the Message Source BOD Type Versions related list.

In general, Infor Back Office Connect inbound processing uses the BOD verbs Sync, Show and Acknowledge in numerous combinations with the supported BOD Nouns.

Each BOD TYPE Version Name is mapped to one or more Salesforce standard objects or Infor Back Office Connect Application custom objects.

Infor Back Office Connect uses these BOD verbs:

BOD Verb	How it is used
Acknowledge	<p>The Acknowledge verb is used to denote a successful data process. When the acknowledge verb is paired with a noun, it signifies that the update was performed.</p> <p>The BOD verb is used to indicate that an outbound process (an outbound message sent from Infor Back Office Connect) was accepted or rejected by ERP.</p>
Confirm	<p>The Confirm verb used to denote an unsuccessful data process. When the confirm verb is paired with a noun, it indicates that the update was not successful and that an error exists in the system that requires investigation and resolution.</p> <p>The Confirm verb is used to indicate that an inbound process (to Infor Back Office Connect via inbound messaging) was rejected by Infor Back Office Connect due to an error. Confirm BODs are sent from Infor Back Office Connect to the ERP or Message Source.</p>
Process	<p>In Outbound Processes, the process verb is used to pass data from Infor Back Office Connect to ERP.</p> <p>The Process verb is used to indicate that an outbound process (sent from Infor Back Office Connect via outbound messaging) was executed. Infor Back Office Connect is attempting to send an outbound message to the ERP.</p>
Show	<p>This verb is used to execute an update to a specific system. When the show verb is paired with a noun, it indicates that an attempt to pass data from ERP to Infor Back Office Connect has or will be made.</p> <p>This verb is used to indicate that an inbound process (from the ERP to Infor Back Office Connect) was executed. The ERP is attempting to send an inbound message to Infor Back Office Connect. The Inbound process could result in the creation of new records or update to existing sync'd records in Infor Back Office Connect. When the Show verb is used, this further indicates that the message was sent exclusively to Infor Back Office Connect. No other back offices received the inbound message.</p> <p>After its initial creation, the Infor Back Office Connect record is "sync'd with the ERP.</p>
Sync	<p>In Inbound Processes, the sync verb is used to pass data from ERP to Infor Back Office Connect.</p> <p>This verb is used to indicate that an inbound process (from the ERP to Infor Back Office Connect) was executed. The ERP is attempting to send an inbound message to Infor Back Office Connect. The Inbound process could result in the creation of new records or update to existing sync'd records in Infor Back Office Connect.</p>

BOD Verb	How it is used
	After its initial creation, the Infor Back Office Connect record is "sync'd with the ERP."

BOD type names

The BOD type name is the combination of a BOD verb and BOD noun. The BOD type name describes the action and the object involved in the data process. For example, the BOD type name AcknowledgeContactMaster is a combination of the BOD noun ContactMaster and the BOD verb Acknowledge. See "Viewing BOD type names" on page 96.

BOD type versions

A BOD type version is the iteration or release number assigned to a BOD, which consists of the BOD type name, the BOD Release ID, and the BOD Version ID. For example, the BOD type version AcknowledgeContactMaster 9.2-2.8.0 is a combination of the BOD type name AcknowledgeContactMaster, the BOD Release ID 9.2, and the BOD Version ID 2.8.0.

BOD documents are periodically updated to include new fields or Xpaths or to remove obsolete fields or Xpaths. When the BOD is updated, the new release number assigned to the BOD is the BOD type version number. See "Viewing the BOD type version number" on page 96.

Note: Multiple BOD type versions can exist for a BOD, but Infor Back Office Connect only uses the first BOD type version for a particular BOD Type.

BOD field mappings

BOD fields mappings indicate which CRM object and field should be updated in the Salesforce when an inbound message is received. The default BOD data set containing all the standard BOD field mappings is published in the *Infor Back Office Connect BOD Mapping and Descriptions (Inbound)* and *Infor Back Office Connect BOD Mapping and Descriptions (Outbound)* guides. These guides are available for download on the **Integration Setup** tab of the Infor Back Office Connect application.

Infor Back Office Connect includes the Bod Field Mappings custom object to view, manage, and customize BOD field mappings to configure the data import process to conform to your business needs. On this screen, Infor Back Office Connect administrators and developers can add or change the location where a BOD message data element (custom field) is mapped to Infor Back Office Connect. See "Viewing BOD field mappings in Infor Back Office Connect" on page 97

During inbound processing, Infor Back Office Connect compares the BOD Field Mappings against the BOD type version details specified in the messages. The BOD Field Mapping object allow the message schema to be revised when it is necessary to receive new or custom data in a BOD message. As future versions of the BOD schemas (BOD verbs and BOD noun combinations) are released, updates to the

BOD field mappings will allow Infor Back Office Connect to respond to new inbound message requests while maintaining previously defined versions of the BOD schema.

Each XML BOD message contains a root element that determines the BOD Type, releaseID, and versionID. Using these values, Infor Back Office Connect identifies which set of BOD Field Mappings should be used to interpret the inbound message.

The data payload is located in the BOD (Noun) portion of the BOD message. Consequently, the BOD's XML x-path expression (defined in the BOD Field Mappings) is relative to the noun element. For example, if you are working with the CustomerPartyMaster BOD XML message, the noun element in the message is CustomerPartyMaster.

BOD entity mappings

BOD entity mappings are used to define objects and objects with BODs that are associated with outbound processes. Outbound processes are triggered by insert, update or delete events. See "Creating conditional BOD trigger events and conditions" on page 93.

Infor Back Office Connect includes the Bod Entity Mappings custom object to view, manage, and customize BOD entity mappings.

Message source

A message source is an ERP system that is configured to send inbound messages to Infor Back Office Connect. During the Infor Back Office Connect configuration process, the Infor Back Office Connect administrator defines one or more message sources that are integrated with Infor Back Office Connect. See "Configuring message source settings" on page 44. After establishing the message source(s) and the remaining integration/configuration tasks are complete, Infor Back Office Connect is ready to receive inbound messages.

During the Infor Back Office Connect configuration process, the administrator can specify a default message source and can also add or modify message sources and their settings for specific BODs and BOD types. Users can also specify a message source when they create a new master record, such as a new account. See the *Infor Back Office Connect User Guide*.

View a list of all the configured message sources on the Message Source object. See "Viewing the configured BOD message sources" on page 102.

Message source BOD type version

Message source BOD type versions are used to map the BOD type versions to a message source. See "BOD type versions" on page 264 and "Message source" on page 265.

Message source BOD type versions are managed on the Message Source BOD Type Versions tab where you can:

- Delete an existing message source BOD type version. See "Deleting a message source BOD type version" on page 87.
- Clone an existing message source BOD type version. See "Cloning a message source BOD type version" on page 86.

Note: You cannot edit an existing message source BOD type version.

The message source BOD type version is used for multi-back office and any BOD functionality to define which BOD type versions are integrated with a particular message source, which enables the message sources to leverage the same BOD type versions that are used on other message sources.

Inbound messages

An inbound message is generated when a BOD is sent from the ERP to Infor Back Office Connect. As inbound messages are sent to Infor Back Office Connect, the Inbound Messages object records the process. See "Viewing inbound messages in Infor Back Office Connect" on page 100.

Infor Back Office Connect uses a SYNC BOD to record that an inbound message was received from the ERP. When the inbound message is received, Infor Back Office Connect will attempt to execute the insert, update or delete action related to the inbound update.

Infor Back Office Connect uses an ACK BOD to send an inbound message to ERP to communicate that the outbound message was rejected.

Understanding inbound message processing

During the Infor Back Office Connect configuration process, the Infor Back Office Connect administrator defines one or more message sources. See "Configuring message source settings" on page 44. The back office is the application you are integrating with Infor Back Office Connect through ION.

After the message source is established and the remaining integration tasks are complete, Infor Back Office Connect is ready to receive inbound messages. You can view the message sources that are configured to send inbound messages to Infor Back Office Connect on the Message Sources object. See "Viewing the configured BOD message sources" on page 102.

Inbound BOD field mappings are associated with a particular BOD Type Version. See "BOD type versions" on page 264. As updated mappings are created, new BOD schema versions become available. When an inbound message is received, the message source is verified to determine which associated BOD Type Versions can be used to parse the message. When Infor Back Office Connect processes the inbound BOD, it locates the highest version ID number found in the BOD Type Version Name to parse the message. For example, if there are multiple versions of the SyncCustomerPartyMaster BOD numbered BTV-0000000000 to BTV-0000000040, Infor Back Office Connect will process BTV-0000000040.

Note: BOD type versions are backwards compatible with prior BOD type versions.

Outbound messages

An outbound message is generated when a BOD is sent from the Infor Back Office Connect to the ERP. As outbound messages are sent to ERP, the Outbound Messages object records the process. See "Viewing outbound messages in Infor Back Office Connect" on page 101.

Infor Back Office Connect uses a PROCESS BOD to execute an outbound insert, update or delete event from Infor Back Office Connect to the ERP.

Infor Back Office Connect uses a CONFIRM BOD to send an outbound message to the ERP to indicate that the inbound message was received.

Infor Back Office Connect uses an ACK TIMEOUT BOD to delete outbound transactions so that inbound BOD's for a particular noun can process.

The retry count is used for dependent BOD's for both inbound and outbound. For inbound, if we are getting a child BOD, we wait for the parent BOD for the set retry. If parent BOD is not received in the set retry, child BOD will get 'was processed' = 9 and a confirmBOD is sent out.

Outbound transactions

When an outbound message is triggered, the Outbound Transaction object temporarily queues the transaction for processing. See "Viewing outbound transactions in Infor Back Office Connect" on page 102.

Based on Salesforce traffic and other processes that may be running in your environment, the Outbound Transaction object may house the queued transaction for a few seconds up to the Salesforce service level agreement (SLA) transaction processing maximum.

Object permission settings for Infor Back Office Connect user profiles



When you work with objects in Infor Back Office Connect, the actions you can perform with the object are defined by update privileges that are associated with your assigned user profile. These update privileges determine whether information sent from the ERP to Infor Back Office Connect can be created, updated, deleted, or is read-only for each user.

The information in this appendix describes the recommended profile object permission configuration settings to assign when creating required Infor Back Office Connect user profiles. See "Creating Infor Back Office Connect profiles" on page 21. Object permission settings for the Infor Back Office Connect profiles are the same as the available Salesforce object permissions: Read, Create, Edit, and Delete.

Recommended object permissions for Infor Back Office Connect User profile

This table shows the recommended profile permissions for standard objects the Infor Back Office Connect User profile:

Object	Read	Create	Edit	Delete
Accounts	X	X	X	X
Assets	X	X	X	X
Campaigns	X			
Cases	X	X	X	
Contacts	X	X	X	X
Contracts	X	X	X	X
Documents	X	X	X	X
Ideas	X	X		
Leads	X	X	X	X

Object permission settings for Infor Back Office Connect user profiles

Object	Read	Create	Edit	Delete
Opportunities	X	X	X	X
Price Books	X			
Products	X			
Push Topics				
Quotes	X	X	X	X
Solutions	X	X		

This table shows the recommended profile permissions for custom Infor Back Office Connect objects the Infor Back Office Connect User profile:

Object	Read	Create	Edit	Delete
Account Bill-to Roles	X	X	X	X
Account Contact Relationships	X	X	X	X
Accounting Entity - Group Mappings				
Account Ship-to Roles	X	X	X	X
Addresses	X	X	X	X
Ad Groups	X	X	X	X
Bill-to Records	X	X	X	X
BillTo-PayFrom Roles	X	X	X	X
Bod Entity Mappings	X			
Bod Field Mappings	X			
Bod Types	X			
Bod Type Versions	X			
Carrier Party	X			
Classification Codes				
Product Lookup Associations	X			
ConfigCategories				
ConfigCategoryProp				
Contact Bill-to Roles	X	X	X	X
Messengers	X	X	X	X
Contact PayFrom Roles	X	X	X	X
Ship-to Roles	X	X	X	X
Customer Returns	X			

Object permission settings for Infor Back Office Connect user profiles

Object	Read	Create	Edit	Delete
Customer Return Lines	X			
Custom				
Google Campaigns	X	X	X	X
Inbound Messages				
Invoices	X			
Invoice Lines	X			
Keywords	X	X	X	X
Loggers	X	X		
Lookups	X			
Lookup Categories	X			
Message Sources	X			
Message Source BOD Type Versions	X			
Outbound Confirm BODs				
Outbound Messages				
Outbound Transactions	X	X		
Pay-from Records	X	X	X	X
Person				
Price List	X			
Quotes	X	X	X	X
Quote Documents	X	X	X	
Quote Line Items	X	X	X	X
Receivables	X			
Receivable Lines	X			
Sales Orders	X			
Sales Order Addresses	X			
Sales Order Line	X			
Search Phrases	X	X	X	X
Serial Lots	X			
SFGA Version	X	X	X	X
Shipments	X			

Object permission settings for Infor Back Office Connect user profiles

Object	Read	Create	Edit	Delete
Shipment Lines	X			
Ship-to Records	X	X	X	X
Ship-to Bill-to Roles	X	X	X	X
Shipto-Carrier Party Roles	X			
Social Media	X	X	X	X
Territories	X			
Text Ads	X	X	X	X
Transaction Addresses	X			
Unit Groups	X			
UOM's	X			

Recommended object permissions for Infor Back Office Connect Administrator and Developer profiles

This table shows the recommended profile permissions for standard objects the Infor Back Office Connect Administrator and Developer profiles:

Object	Read	Create	Edit	Delete
Accounts	X	X	X	X
Assets	X	X	X	X
Campaigns	X	X	X	X
Cases	X	X	X	
Contacts	X	X	X	X
Contracts	X	X	X	X
Documents	X	X	X	X
Ideas	X	X	X	X
Leads	X	X	X	X
Opportunities	X	X	X	X
Price Books	X	X	X	X
Products	X	X	X	X
Push Topics	X	X	X	X

Object permission settings for Infor Back Office Connect user profiles

Object	Read	Create	Edit	Delete
Quotes	X	X	X	X
Solutions	X	X	X	X

This table shows the recommended profile permissions for custom Infor Back Office Connect objects the Infor Back Office Connect Administrator and Developer profiles:

Object	Read	Create	Edit	Delete
Account Bill-to Roles	X	X	X	X
Account Contact Relationships	X	X	X	X
Accounting Entity - Group Mappings	X	X	X	X
Account Ship-to Roles	X	X	X	X
Addresses	X	X	X	X
Ad Groups	X	X	X	X
Bill-to Records	X	X	X	X
BillTo-PayFrom Roles	X	X	X	X
Bod Entity Mappings	X	X	X	X
Bod Field Mappings	X	X	X	X
Bod Types	X	X	X	X
Bod Type Versions	X	X	X	X
Carrier Party	X	X	X	X
Classification Codes	X	X	X	X
Product Lookup Associations	X	X	X	X
ConfigCategories	X	X	X	X
ConfigCategoryProp	X	X	X	X
Contact Bill-to Roles	X	X	X	X
Messengers	X	X	X	X
Contact PayFrom Roles	X	X	X	X
Ship-to Roles	X	X	X	X
Customer Returns	X	X	X	X
Customer Return Lines	X	X	X	X
Custom	X	X	X	X
Google Campaigns	X	X	X	X
Inbound Messages	X	X	X	X

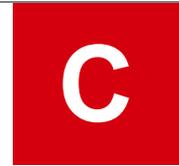
Object permission settings for Infor Back Office Connect user profiles

Object	Read	Create	Edit	Delete
Invoices	X	X	X	X
Invoice Lines	X	X	X	X
Keywords	X	X	X	X
Loggers	X	X	X	X
Lookups	X	X	X	X
Lookup Categories	X	X	X	X
Message Sources	X	X	X	X
Message Source BOD Type Versions	X	X	X	X
Outbound Confirm BODs	X	X	X	X
Outbound Messages	X	X	X	X
Outbound Transactions	X	X	X	X
Pay-from Records	X	X	X	X
Person				
Price List	X	X	X	X
Quotes	X	X	X	X
Quote Documents	X	X	X	
Quote Line Items	X	X	X	X
Receivables	X	X	X	X
Receivable Lines	X	X	X	X
Sales Orders	X	X	X	X
Sales Order Addresses	X	X	X	X
Sales Order Line	X	X	X	X
Search Phrases	X	X	X	X
Serial Lots	X	X	X	X
SFGA Version	X	X	X	X
Shipments	X	X	X	X
Shipment Lines	X	X	X	X
Ship-to Records	X	X	X	X
Ship-to Bill-to Roles	X	X	X	X
Shipto-Carrier Party Roles	X	X	X	X

Object permission settings for Infor Back Office Connect user profiles

Object	Read	Create	Edit	Delete
Social Media	X	X	X	X
Territories	X	X	X	X
Text Ads	X	X	X	X
Transaction Addresses	X	X	X	X
Unit Groups	X	X	X	X
UOM's	X	X	X	X

Standard object custom fields



The information in this appendix provides information on the custom fields that can be added to standard Salesforce objects to support Infor Back Office Connect. Custom fields information is located in the Custom Fields & Relationships section of the object you want to customize. See Salesforce documentation.

Account object custom fields

This table shows custom fields that can be added to the standard Salesforce Account object to support Infor Back Office Connect:

Field Label	Field Name	API Name	Data Type	Controlling Field
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text (255)	
Active	Active	Active__c	Picklist	
Address Type	addresstype	addresstype__c	Text (255)	
Area	areaid	areaid__c	Lookup	
Attention of Name	primaryaddressname	primaryaddressname__c	Text (255)	
Bulk Email Opt Out	HasOptedOut OfBulkEmail	HasOptedOut OfBulkEmail__c	Check box	
Can Send Bod	cansendbod	cansendbod__c	Checkbox	
City	primaryaddresscity	primaryaddresscity__c	Text (255)	
Country	primaryaddresscountry	primaryaddresscountry__c	Text (255)	
Credit Limit	creditlimit	creditlimit__c	Number	
Customer ID	extRecordId	extRecordId__c	Text (255)	
Customer Priority	CustomerPriority	CustomerPriority__c	Picklist	

Standard object custom fields

Field Label	Field Name	API Name	Data Type	Controlling Field
Customer Type	customertypeid	customertypeid__c	Lookup	
Email	email	email__c	Email	
Email Opt Out	HasOptedOutOfEmail	HasOptedOutOfEmail__c	Checkbox	
Fax Opt Out	HasOptedOutOfFax	HasOptedOutOfFax__c	Checkbox	
Inco Term	incotermid	incotermid__c	Lookup	
Industry	industryid	industryid__c	Lookup	
In Sync	InSync	InSync__c	Checkbox	
Line1	primaryaddressline1	primaryaddressline1__c	Text (255)	
Line2	primaryaddressline2	primaryaddressline2__c	Text (255)	
Line3	primaryaddressline3	primaryaddressline3__c	Text (255)	
Line4	primaryaddressline4	primaryaddressline4__c	Text (255)	
Line5	primaryaddressline5	primaryaddressline5__c	Text (255)	
Line6	primaryaddressline6	primaryaddressline6__c	Text (255)	
Location ID	locationid	locationid__c	Text (255)	
Logical ID	extlogicalid	extlogicalid__c	Text (255)	
Mail Opt Out	HasOptedOutOfMail	HasOptedOutOfMail__c	Checkbox	
Market	marketid	marketid__c	Lookup	
Message Source	Message_Source	Message_Source__c	Lookup	
NAICS	naicsid	naicsid__c	Lookup	
Number of Locations	NumberofLocations	NumberofLocations__c	Number	
Other Phone	otherphone	otherphone__c	Phone	
parentaccountid	parentaccounttextid	parentaccounttextid__c	Text (255)	
Payment Term	paymenttermid	paymenttermid__c	Lookup	
Phone Opt Out	HasOptedOutOfPhone	HasOptedOutOfPhone__c	Checkbox	
Preferred Contact Method	Preferred_Contact_Method	Preferred_Contact_Method__c	Picklist	
Primary Address	primaryaddress	primaryaddress__c	Lookup	Account ID
Primary Contact	primarycontact	primarycontact__c	Lookup	

Field Label	Field Name	API Name	Data Type	Controlling Field
Ship Address Price Group	shipadrpricegroupid	shipadrpricegroupid__c	Lookup	
SIC Code	SICCode	SICCode__c	Lookup	
SLA	SLA	SLA__c	Lookup	
SLA Expiration Date	SLAExpirationDate	SLAExpirationDate__c	Date	
SLA Serial Number	SLASerialNumber	SLASerialNumber__c	Text (255)	
State/Province	primaryaddressstate	primaryaddressstate__c	Text (255)	
Status	statuscode	statuscode__c	Picklist	
Territory	territory	territory__c	Lookup	
Unique ID	extid	extid__c	Text	
Upsell Opportunity	UpsellOpportunity	UpsellOpportunity__c	Picklist	
Variation Id	variationId	variationId__c	Number	
Zip/Postal Code	primaryaddress postalcode	primaryaddress postalcode__c	Text	

Contact object custom fields

This table shows custom fields that can be added to the standard Salesforce Contact object to support Infor Back Office Connect:

Field Label	Field Name	API Name	Data Type	Controlling Field
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text (255)	
Address	primaryaddress	primaryaddress__c	Lookup	
Address Type	addresstype	addresstype__c	Text (255)	
Attention of Name	primaryaddressname	primaryaddressname__c	Text (255)	
cansendbod	cansendbod	cansendbod__c	Checkbox	
City	primaryaddresscity	primaryaddresscity__c	Text (255)	
Contact ID	extRecordId	extRecordId__c	Text (255)	

Standard object custom fields

Field Label	Field Name	API Name	Data Type	Controlling Field
Country	primaryaddresscountry	primaryaddresscountry__c	Text (255)	
Do Not Mail	donotmail	donotmail__c	Checkbox	
Employer Ref ID	extemprefid	extemprefid__c	Text (255)	
Gender Code	gendercode	gendercode__c	Picklist	
Home Email	homeemail	homeemail__c	Email	
In Sync	InSync	InSync__c	Checkbox	
Job Title	jobtitle	jobtitle__c	Text (255)	
Languages	Languages	Languages__c	Text (255)	
Level	Level	Level__c	Picklist	
Line1	primaryaddressline1	primaryaddressline1__c	Text (255)	
Line2	primaryaddressline2	primaryaddressline2__c	Text (255)	
Line3	primaryaddressline3	primaryaddressline3__c	Text (255)	
Line4	primaryaddressline4	primaryaddressline4__c	Text (255)	
Line5	primaryaddressline5	primaryaddressline5__c	Text (255)	
Line6	primaryaddressline6	primaryaddressline6__c	Text (255)	
Location ID	locationid	locationid__c	Text (255)	
Logical ID	extlogicalid	extlogicalid__c	Text (255)	
Marital Status	maritalstatus	maritalstatus__c	Picklist	
Message Source	Message_Source	Message_Source__c	Lookup	
Middle Name	middlename	middlename__c	Text (255)	
Mobile Office	mobileoffice	mobileoffice__c	Phone	
Nick Name	nickname	nickname__c	Text (255)	
Parent Account ExtID	parentaccoun textid	parentaccountextid__c	Text (255)	
Preferred Contact Method	Preferred_Contact_ Method	Preferred_Contact_ Method__c	Picklist	
Preferred Email	preferredemail	preferredemail__c	Picklist	
Primary Phone	primaryphone	primaryphone__c	Picklist	
State/Province	primaryaddressstate	primaryaddressstate__c	Text (255)	
Status	statuscode	statuscode__c	Picklist	

Field Label	Field Name	API Name	Data Type	Controlling Field
Unique ID	extid	extid__c	Text (255)	
url	url	url__c	Text (255)	
Variation Id	variationId	variationId__c	Number	
Website	Website	Website__c	URL	
Zip/Postal Code	primaryaddress postalcode	primaryaddress postalcode__c	Text	

Leads object custom fields

This table shows custom fields that can be added to the standard Salesforce Leads object to support Infor Back Office Connect:

Field Label	Field Name	API Name	Data Type	Controlling Field
Address Type	addresstype	addresstype__c	Picklist	
Correlation Data	Correlation_Data	SFGA__Correlation_ Data__c	Long Text Area	
CorrelationID	CorrelationID	SFGA__CorrelationID__c	Text (255)	
Current Generator(s)	CurrentGenerators	CurrentGenerators__c	Text (100)	
Number of Locations	NumberofLocations	NumberofLocations__c	Number	
Primary	Primary	Primary__c	Picklist	
Product Interest	ProductInterest	ProductInterest__c	Picklist	
SIC Code	SICCode	SICCode__c	Text (15)	
Web Source	Web_Source	SFGA__Web_Source__c	Text (255)	

Opportunities object custom fields

This table shows custom fields that can be added to the standard Salesforce Opportunities object to support Infor Back Office Connect:

Standard object custom fields

Field Label	Field Name	API Name	Data Type	Controlling Field
Current Generator(s)	CurrentGenerators	CurrentGenerators__c	Text (100)	
Delivery/Installation Status	DeliveryInstallationStatus	DeliveryInstallationStatus__c	Picklist	
Is System Opportunity	isystemopportunity	isystemopportunity__c	Checkbox	
Main Competitor(s)	MainCompetitors	MainCompetitors__c	Text (100)	
Order Number	OrderNumber	OrderNumber__c	Text (8)	
Synced Quote	SyncedQuote	SyncedQuote__c	Lookup	
Tracking Number	TrackingNumber	TrackingNumber__c	Text (12)	
Unique ID	extid	extid__c	Text (255)	

Products object custom fields

This table shows custom fields that can be added to the standard Salesforce Products object to support Infor Back Office Connect:

Field Label	Field Name	API Name	Data Type	Controlling Field
Accounting Entity Id	extaccountingentityid	extaccountingentityid__c	Text (255)	
Base Cost	BaseCost	BaseCost__c	Currency	
Base Cost Currency	BaseCost_Currency	BaseCost_Currency__c	Text (3)	
Can Send Bod	cansendbod	cansendbod__c	Checkbox	
Default Unit	defaulttuomid	defaulttuomid__c	Lookup	
In Sync	InSync	InSync__c	Checkbox	
Location Id	locationId	locationId__c	Text	
Logical Id	extlogicalid	extlogicalid__c	Text (255)	
Product ID	extRecordId	extRecordId__c	Text (255)	
Service Indicator	serviceindicator	serviceindicator__c	Checkbox	

Field Label	Field Name	API Name	Data Type	Controlling Field
Status	statuscode	statuscode__c	Picklist	
Unique ID	extld	extld__c	Text (255)	
Unit Group	defaultuomscheduleid	defaultuomscheduleid__c	Lookup	
Variation Id	variationid	variationid__c	Number	

Quotes object custom fields

This table shows custom fields that can be added to the standard Salesforce Quote object to support Infor Back Office Connect:

Field Label	Field Name	API Name	Data Type	Controlling Field
Accounting Entity Id	extaccountingentityid	extaccountingentityid__c	Text (100)	
Bill-to	billto	billto__c	Lookup	
Bill-to Address	billtoaddress	billtoaddress__c	Lookup	
Bill-to Line 1	billtoline1	billtoline1__c	Formula	
Bill-to Line 2	billtoline2	billtoline2__c	Formula	
Bill-to Line 3	billtoline3	billtoline3__c	Formula	
Bill-to Line 4	billtoline4	billtoline4__c	Formula	
Bill-to Line 5	billtoline5	billtoline5__c	Formula	
Bill-to Line 6	billtoline6	billtoline6__c	Formula	
Bill-to Name	billtoname	billtoname__c	Text (255)	
Can Send Bod	cansendbod	cansendbod__c	Checkbox	
Carrier Code	carriercode	carriercode__c	Text (50)	
Carrier Name	carriername	carriername__c	Text (100)	
Department	department	department__c	Text (255)	
Effective From	effectivefrom	effectivefrom__c	Date/Time	
ERP Grand Total	totalamount	totalamount__c	Currency	
Expire On	expireon	expireon__c	Date/Time	
Extended Amount	extendedamount	extendedamount__c	Currency	

Standard object custom fields

Field Label	Field Name	API Name	Data Type	Controlling Field
Freight Term Code	freighttermcode	freighttermcode__c	Text (255)	
In Sync	InSync	InSync__c	Checkbox	
Location ID	locationid	locationid__c	Text (100)	
Logical ID	extlogicalid	extlogicalid__c	Text (255)	
Pay-from	payfrom	payfrom__c	Lookup	
Pay-from Contact Name	payfromcontactname	payfromcontactname__c	Text (255)	
Pay-from Name	payfromname	payfromname__c	Text (255)	
Probability	probability	probability__c	Number	
Quotes Id	extRecordId	extRecordId__c	Text (255)	
Requested Delivery By	requesteddeliveryby	requesteddeliveryby__c	Date/Time	
RFQ Number	rfqnumber	rfqnumber__c	Text (255)	
Ship Complete Flag	shipcompleteflag	shipcompleteflag__c	Checkbox	
Ship-to Line 1	shiptoline1	shiptoline1__c	Formula	
Ship-to Line 2	shiptoline2	shiptoline2__c	Formula	
Ship-to Line 3	shiptoline3	shiptoline3__c	Formula	
Ship-to Line 4	shiptoline4	shiptoline4__c	Formula	
Ship-to Line 5	shiptoline5	shiptoline5__c	Formula	
Ship-to Line 6	shiptoline6	shiptoline6__c	Formula	
Ship-to Name	shiptoname	shiptoname__c	Text (255)	
Sold-to Address	soldtoaddress	soldtoaddress__c	Lookup	
Sold-to Line 1	soldtoline1	soldtoline1__c	Formula	
Sold-to Line 2	soldtoline2	soldtoline2__c	Formula	
Sold-to Line 3	soldtoline3	soldtoline3__c	Formula	
Sold-to Line 4	soldtoline4	soldtoline4__c	Formula	
Sold-to Line 5	soldtoline5	soldtoline5__c	Formula	
Sold-to Line 6	soldtoline6	soldtoline6__c	Formula	
Sold-to Name	soldtoname	soldtoname__c	Text (255)	

Quote line item object custom fields

This table shows custom fields that can be added to the standard Salesforce Quote Line Item object to support Infor Back Office Connect:

Field Label	Field Name	API Name	Data Type	Controlling Field
ERP Line Number	linenumber	linenumber__c	Number	
ERP Total Amount	totalamount	totalamount__c	Currency	
Existing Product Name	productid	productid__c	Lookup	
Extended Amount	extendedamount	extendedamount__c	Currency	
Extended Cost	extendedcost	extendedcost__c	Currency	
Is Price Overridden	ispriceoverridden	ispriceoverridden__c	Checkbox	
Ownership Transfer	ownershiptransfer	ownershiptransfer__c	Text (255)	
Price Per Price Unit	priceperpriceunit	priceperpriceunit__c	Currency	
Price Per Price Uom	priceperpriceuom	priceperpriceuom__c	Text (10)	
Price Per Unit	priceperunit	priceperunit__c	Currency	
Probability	probability	probability__c	Number	
Product Description	productdescription	productdescription__c	Long Text Area	
Promised Ship Date	promisedshipdate	promisedshipdate__c	Date/Time	
Ship Complete Flag	shipcompleteflag	shipcompleteflag__c	Checkbox	
Ship-to City	shiptocity	shiptocity__c	Text (50)	
Ship-to Contact	shiptocontactname	shiptocontactname__c	Text (100)	
Ship-to Contact Id	shiptocontactid	shiptocontactid__c	Text (255)	
Ship-to Country/Region	shiptocountry	shiptocountry__c	Text (50)	
Ship-to Line 1	shiptoline1	shiptoline1__c	Text (50)	
Ship-to Line 2	shiptoline2	shiptoline2__c	Text (50)	
Ship-to Line 3	shiptoline3	shiptoline3__c	Text (50)	

Standard object custom fields

Field Label	Field Name	API Name	Data Type	Controlling Field
Ship-to Line 4	shiptoline4	shiptoline4__c	Text (50)	
Ship-to Line 5	shiptoline5	shiptoline5__c	Text (50)	
Ship-to Line 6	shiptoline6	shiptoline6__c	Text (50)	
Ship-to Location	shiptolocation	shiptolocation__c	Text (100)	
Ship-to Name	shiptoname	shiptoname__c	Text (100)	
Ship-to State/Province	shiptostateorprovince	shiptostateorprovince__c	Text (50)	
Ship-to Zip/Postal Code	shiptopostalcode	shiptopostalcode__c	Text (20)	
Status	statuscode	statuscode__c	Picklist	
Tax	tax	tax__c	Currency	
Unit	uomid	uomid__c	Lookup	
Warehouse City	warehousecity	warehousecity__c	Text (50)	
Warehouse Code	warehousecode	warehousecode__c	Text (255)	
Warehouse Contact Name	warehousecontactname	warehousecontactname__c	Text (100)	
Warehouse Country/Region	warehousecountry	warehousecountry__c	Text (50)	
Warehouse Line 1	warehouseline1	warehouseline1__c	Text (50)	
Warehouse Line 2	warehouseline2	warehouseline2__c	Text (50)	
Warehouse Line 3	warehouseline3	warehouseline3__c	Text (50)	
Warehouse Line 4	warehouseline4	warehouseline4__c	Text (50)	
Warehouse Line 5	warehouseline5	warehouseline5__c	Text (50)	
Warehouse Line 6	warehouseline6	warehouseline6__c	Text (50)	
Warehouse Location	warehouselocation	warehouselocation__c	Text (100)	
Warehouse Name	warehousename	warehousename__c	Text (100)	
Warehouse State/Province	warehousestateorprovince	warehousestateorprovince__c	Text (50)	
Warehouse Zip/Postal Code	warehousepostalcode	warehousepostalcode__c	Text (20)	

Field Label	Field Name	API Name	Data Type	Controlling Field
Write-In Product Name	writeinproduct	writeinproduct__c	Text (100)	

The information in this appendix provides information on Infor Back Office Connect custom objects and tabs. Including their definition details, standard fields, and custom fields and relationships.

Custom objects

Custom objects are managed objects installed with the Infor Back Office Connect package to enable Infor Back Office Connect functionality.



Caution: Making modifications to Infor Back Office Connect custom objects can prevent Infor Back Office Connect from working properly.

To view a list of all Infor Back Office Connect custom objects:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Create > Objects**.
- 5 View the list of custom objects. In the Installed Package column, Infor Back Office Connect is displayed for all Infor Back Office Connect custom objects.
- 6 Optionally, in the Label column, click the custom object hyperlink to view the custom object definition detail for an object. For example, click [BOD Entity Mapping](#). See also "Custom object definition details" on page 291.

Controlled custom objects

A number of the Infor Back Office Connect custom objects controlled custom objects used to Infor ION with ERP. These controlled custom objects must not be modified without assistance from Infor customer support. This is a list of all the Infor Back Office Connect controlled custom objects:

- Bod Entity Mapping

- Bod Field Mapping
- Bod Type
- Bod Type Version
- Carrier Party
- Classification Code
- ConfigCategory
- ConfigCategoryProp
- Contact Messenger
- Message Source
- Message Source BOD Type Version
- Person
- Price List
- Serial Lot
- Shipto-Carrier Party Role
- Social Media
- Transaction Address
- Unit Group
- UOM
- Warehouse

Account contact role and address sync

Account Contact Role and Address Sync keeps standard object data in sync with data in Infor Back Office Connect custom objects.

Address custom object

The Address custom object supports multiple addresses. The primary address is stored in the Account, Contact, Bill-to, Pay-from and Ship-to. All additional addresses are stored in the custom Address object.

Account contact role custom object

The Account Contact role custom object supports ERP integration requirements. To support existing reporting, data stored in custom Account Contact Role object records is copied to the standard Account Contact Role object record whenever the back office adds or updates the custom Account Contact Role record.

Custom tabs

Custom tabs display Infor Back Office Connect custom object data. Infor Back Office Connect are created in the Salesforce application during the Infor Back Office Connect installation. Infor Back Office Connect tabs are enabled and disabled based on the privileges assigned to each Infor Back Office Connect user based on their associated profile configuration. See "Creating Infor Back Office Connect profiles" on page 21.

To view a list of all Infor Back Office Connect custom tabs:

- 1 Log in to Salesforce as the Infor Back Office Connect administrator.
- 2 In the Force.com **App** menu, select **Infor Back Office Connect Administration**.
- 3 Select **Setup**.
- 4 In the sidebar column, select **App Setup > Create > Tabs**.
- 5 View the list of custom object tabs.
- 6 Optionally, in the Label column, click the custom object hyperlink to view the custom tab definition detail for a tab.

Custom object definition details

The custom object definitions in this section provide information on the Infor Back Office Connect custom objects that can be useful during the BOD field mapping and customization process. You can also view more information about each custom object in the Infor Back Office Connect application. See "Custom objects" on page 289.

Note: Retired custom objects are denoted by the `zz_` prefix at the beginning of the object name. For example, `zz_Account Bill-to Role`.

Retired custom objects must be updated on the page layouts and reports by the Infor Back Office Connect Administrator.

Account Contact Relationship object

This table shows the Custom Object Definition Details for the Account Contact Relationship object:

Custom Object	Definition Detail
Singular Label	Account Contact Relationship
Plural Label	Account Contact Relationships
Object Name	AccountContactRole
API Name	AccountContactRole__c

Custom objects and tabs

This table shows the standard fields on the Account Contact Relationship object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Reference #	Name	Auto Number

This table shows the custom fields and relationships on the Account Contact Relationship object:

Field Label	Field Name	API Name	Data Type
Account	account	account__c	Master-Detail(Account)
Contact	contact	contact__c	Master-Detail(Account)
Employer Account	employeraccount	employeraccount__c	Formula (Text)
Is Primary	isPrimary	isPrimary__c	Checkbox
Role	Role	Role__c	Picklist

Accounting Entity Table object

This object is installed with the Multi-company reference package. This table shows the Custom Object Definition Details for the Accounting Entity Table object:

Custom Object	Definition Detail
Singular Label	Accounting Entity Table
Plural Label	Accounting Entity Tables
Object Name	aegrpmapping
API Name	aegrpmapping__c

This table shows the standard fields on the Accounting Entity Table object:

Field Label	Field Name	Data Type
Accounting Entity Name	Name	Auto Number
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User,Queue)

This table shows the custom fields and relationships on the Accounting Entity Table object:

Field Label	Field Name	API Name	Data Type
Accounting Entity ID	accountingentityid	accountingentityid__c	Text(255)
Composite Key	compositekey	compositeKey__c	Formula(Text)
Location ID	locationid	locationid__c	Text(255)
Owner	owner	owner__c	Lookup(User)

Address object

This table shows the Custom Object Definition Details for the Address object:

Custom Object	Definition Detail
Singular Label	Address
Plural Label	Addresses
Object Name	address
API Name	address__c

This table shows the standard fields on the Address object:

Field Label	Field Name	Data Type
Address Name	Name	Auto Number
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User,Queue)

This table shows the custom fields and relationships on the Address object:

Field Label	Field Name	API Name	Data Type
Account	Account	Account__c	Lookup(Account)
Address Type	addresstype	addresstype__c	Picklist
Attention of Name	attentionofname	attentionofname__c	Text(255)
Bill To	billto	billto__c	Lookup(Bill-to)
City	city	city__c	Text(255)
Contact	contact	contact__c	Lookup(Contact)

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Country	country	country__c	Text(255)
Is Primary Address	isprimaryaddress	isprimaryaddress__c	Checkbox
Pay From	payfrom	payfrom__c	Lookup(Pay-from)
Ship To	Shipto	Shipto__c	Lookup(Ship-to)
State/Province	stateorprovince	stateorprovince__c	Text(100)
Street	street	street__c	Text Area(255)
Zip/Postal Code	postalcode	postalcode__c	Text (255)
zz_Line 1	line1	line1__c	Text(255)
zz_Line 2	line2	line2__c	Text(255)
zz_Line 3	line3	line3__c	Text(255)
zz_Line 4	line4	line4__c	Text(255)
zz_Line 5	line5	line5__c	Text(255)
zz_Line 6	line6	line6__c	Text(255)

Message Source object

This table shows the Custom Object Definition Details for the Message Source object:

Custom Object	Definition Detail
Singular Label	Message Source
Plural Label	Message Sources
Object Name	messagesource
API Name	messagesource__c

This table shows the standard fields on the Message Source object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Message Source Name	Name	Text(80)
Owner	Owner	Lookup(User, Queue)

This table shows the custom fields and relationships on the Message Source object:

Field Label	Field Name	API Name	Data Type
Default Accounting Entity ID	defaultexternalaccountingentityid	defaultexternalaccountingentityid__c	Text(255)
Default Location ID	defaultexternalallocationid	defaultexternalallocationid__c	Text(255)
Entity Acronym	entityacronym	entityacronym__c	Text(255)
Entity Type	entitytype	entitytype__c	Long Text Area(32768)
isActive	isActive	isActive__c	Checkbox
Logical ID	logicalid	logicalid__c	Text(255)
Sequence Id	sequenceid	sequenceid__c	Text(255) (External ID) (Unique Case Insensitive)
URL	messagesourceurl	messagesourceurl__c	URL(255)

Message Source BOD Type Versions object

This table shows the Custom Object Definition Details for the Message Source BOD Type Versions object:

Custom Object	Definition Detail
Singular Label	Message Source BOD Type Version
Plural Label	Message Source BOD Type Versions
Object Name	msgsrcbodtypeversion
API Name	msgsrcbodtypeversion__c

This table shows the standard fields on the Message Source BOD Type Versions object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup (User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup (User)
Message Source BOD Type Version Name	Name	Auto Number

Custom objects and tabs

This table shows the custom fields and relationships on the Message Source BOD Type Versions object:

Field Label	Field Name	API Name	Data Type
Bod Type Version	bodtypeversion	bodtypeversion__c	Master-Detail
Message Source	messagesource	messagesource__c	Master-Detail
Sequence Id	sequenceid	sequenceid__c	Text (255)

Bill-to object

This table shows the Custom Object Definition Details for the Bill-to object:

Custom Object	Definition Detail
Singular Label	Bill-to
Plural Label	Bill-to Records
Object Name	billto
API Name	billto__c

This table shows the standard fields on the Bill-to object:

Field Label	Field Name	Data Type
Bill-to Name	Name	Text(80)
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User,Queue)

This table shows the custom fields and relationships on the Bill-to object:

Field Label	Field Name	API Name	Data Type
Account	account	Account__c	Lookup(Account)
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text(255)
Attention of Name	primaryaddressname	primaryaddressname__c	Text(255)
Message Source	Message_Source	Message_Source__c	Lookup(Message Source)
Bill-to ID	extRecordId	extRecordId__c	Text(255)
Can Send Bod	cansendbod	cansendbod__c	Checkbox

Field Label	Field Name	API Name	Data Type
Carrier Name	carriername	carriername__c	Text(255)
Carrier Number	carriernumber	carriernumber__c	Text(255)
City	primaryaddresscity	primaryaddresscity__c	Text(255)
Country	primaryaddresscountry	primaryaddresscountry__c	Text(255)
Email	email	email__c	Email
Fax	fax	fax__c	Phone
In Sync	InSync	InSync__c	Checkbox
Location ID	locationid	locationid__c	Text(255)
Logical ID	extlogicalid	extlogicalid__c	Text(255)
Other Phone	otherphone	otherphone__c	Phone
Payment Term	paymenttermid	paymenttermid__c	Lookup(Lookup)
Primary Phone	mainphone	mainphone__c	Phone
Ship-to	shipto	shipto__c	Lookup(Ship-to)
SIC Code	SICCode	SICCode__c	Lookup(Lookup)
State/Province	primaryaddressstate	primaryaddressstate__c	Text(100)
Status	statuscode	statuscode__c	Picklist
Street	primaryaddressstreet	primaryaddressstreet__c	Long Text Area(256)
Unique ID	extid	extid__c	Text(255) (External ID) (Unique Case In-sensitive)
Variation Id	variationId	variationId__c	Number(18, 0)
Web Site	website	website__c	URL(255)
Zip/Postal Code	primaryaddresspostalcode	primaryaddresspostalcode__c	Text(255)
zz_Address Type	addresstype	addresstype__c	Text(255)
zz_Bill-to Line 1	primaryaddressline1	primaryaddressline1__c	Text(255)
zz_Bill-to Line 2	primaryaddressline2	primaryaddressline2__c	Text(255)
zz_Bill-to Line 3	primaryaddressline3	primaryaddressline3__c	Text(255)
zz_Bill-to Line 4	primaryaddressline4	primaryaddressline4__c	Text(255)
zz_Bill-to Line 5	primaryaddressline5	primaryaddressline5__c	Text(255)
zz_Bill-to Line 6	primaryaddressline6	primaryaddressline6__c	Text(255)
zz_Primary Address	primaryaddress	primaryaddress__c	Lookup(Address)

Field Label	Field Name	API Name	Data Type
zz_Primary Contact	primarycontactid	primarycontactid__c	Lookup(Contact)

Bod Entity Mapping object

This table shows the Custom Object Definition Details for the Bod Entity Mapping object:

Custom Object	Definition Detail
Singular Label	Bod Entity Mapping
Plural Label	Bod Entity Mappings
Object Name	bodentitymapping
API Name	bodentitymapping__c

This table shows the standard fields on the Bod Entity Mapping object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
ID	Name	Auto Number
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User,Queue)

This table shows the custom fields and relationships on the Bod Entity Mapping object:

Field Label	Field Name	API Name	Data Type
Active	isActive	isActive__c	Checkbox
Message Source	messagesource	messagesource__c	Lookup(Message Source)
Bod Entity Mapping Name	bodentitymappingname	bodentitymappingname__c	Text(255)
BOD Noun	bodnoun	bodnoun__c	Text(255)
BOD Trigger Condition	condition	condition__c	Long Text Area(5000)
BOD Trigger Event	triggerevent	triggerevent__c	Picklist(Multi-Select)
Bod Type	bodytype	bodytype__c	Lookup(Bod Type)
Bod Type Version	bodytypeversionid	bodytypeversionid__c	Lookup(Bod Type Version)

Field Label	Field Name	API Name	Data Type
CRM Entity Name	crmentityname	crmentityname__c	Text(255)
Entity Acronym	entityacronym	entityacronym__c	Text(3)
Handler Class Name	handlerClass	handlerClass__c	Text(255)
Is Custom	isCustom	isCustom__c	Checkbox
Key Fields	keyfields	keyfields__c	Text(255)
Parent CRM Entity Name	parentcrmentityname	parentcrmentityname__c	Text(255)
Reference Field	refencefield	refencefield__c	Text(255)
Sequence Id	sequenceid	sequenceid__c	Text(255) (External ID) (Unique Case Insensitive)
Sharable	sharable	sharable__c	Checkbox
Sync Direction	syncDirection	syncDirection__c	Picklist

Bod Field Mapping object

This table shows the Custom Object Definition Details for the Bod Field Mapping object:

Custom Object	Definition Detail
Singular Label	Bod Field Mapping
Plural Label	Bod Field Mappings
Object Name	bodfieldmapping
API Name	bodfieldmapping__c

This table shows the standard fields on the Bod Field Mapping object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
ID	Name	Auto Number
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)

This table shows the custom fields and relationships on the Bod Field Mapping object:

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Active	isActive	isActive__c	Checkbox
Bod Field Mapping Name	bodfieldmappingname	bodfieldmappingname__c	Text(255)
Bod Type Version	bodtypeversion	bodtypeversion__c	Lookup
BOD Xpath	bodxpath	bodxpath__c	Text(255)
CRM Attribute Name	crmattributename	crmattributename__c	Text(255)
CRM Entity Name	crmentityname	crmentityname__c	Text(255)
Default Value	defaultvalue	defaultvalue__c	Text(255)
Field Type	dataType	dataType__c	Picklist
Is Custom	isCustom	isCustom__c	Checkbox
Is System	isSystem	isSystem__c	Checkbox
Key Attribute	iskeyattribute	iskeyattribute__c	Checkbox
Mandatory Flag	isMandatory	isMandatory__c	Checkbox
Related Object Api Name	relatedObjApiName	relatedObjApiName__c	Text(80)
Repeated Elements	repeatedElements	repeatedElements__c	Long Text Area(32768)
Sequence Id	sequenceid	sequenceid__c	Text(255) (External ID) (Unique Case In-sensitive)

Bod Type object

This table shows the Custom Object Definition Details for the Bod Type object:

Custom Object	Definition Detail
Singular Label	Bod Type
Plural Label	Bod Types
Object Name	Bod_Type
API Name	Bod_Type__c

This table shows the standard fields on the Bod Type object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)

Field Label	Field Name	Data Type
Currency	CurrencyIsoCode	Picklist
ID	Name	Auto Number
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)

This table shows the custom fields and relationships on the Bod Type object:

Field Label	Field Name	API Name	Data Type
Active	isActive	isActive__c	Checkbox
Bod Type Name	bodytypename	bodytypename__c	Text(255)
Is Custom	iscustom	iscustom__c	Checkbox
Noun	noun	noun__c	Text(255)
Sequence Id	sequenceid	sequenceid__c	Text(255) (External ID) (Unique Case Insensitive)
Verb	verb	verb__c	Text(255)

Bod Type Version object

This table shows the Custom Object Definition Details for the Bod Type Version object:

Custom Object	Definition Detail
Singular Label	Bod Type Version
Plural Label	Bod Type Versions
Object Name	bodytypeversion
API Name	bodytypeversion__c

This table shows the standard fields on the Bod Type Version object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
ID	Name	Auto Number
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)

Custom objects and tabs

This table shows the custom fields and relationships on the Bod Type Version object:

Field Label	Field Name	API Name	Data Type
Active	isActive	isActive__c	Checkbox
Bod Release Id	bodreleaseid	bodreleaseid__c	Text(255)
Bod Type	bodtypeid	bodtypeid__c	Lookup(Bod Type)
Bod Type Version Name	bodtypeversionname	bodtypeversionname__c	Text(255)
Bod Version Id	bodversionid	bodversionid__c	Text(255)
Is Custom	iscustom	iscustom__c	Checkbox
Message Source	messagesourceid	messagesourceid__c	Lookup(Message Source)
Sequence Id	sequenceid	sequenceid__c	Text(255) (External ID) (Unique Case In-sensitive)

Classification Code object

This table shows the Custom Object Definition Details for the Classification Code object:

Custom Object	Definition Detail
Singular Label	Classification Code
Plural Label	Product Lookup Associations
Object Name	productlookupassociation
API Name	productlookupassociation__c

This table shows the standard fields on the Classification Code object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Product Lookup Name	Name	Auto Number

This table shows the custom fields and relationships on the Classification Code object:

Field Label	Field Name	API Name	Data Type
Classification Name	lookupcategory	lookupcategory__c	Formula (Text)

Field Label	Field Name	API Name	Data Type
Classification Value	lookup	lookup__c	Master Detail(Lookup)
Product	product	product__c	Lookup(Product)

ConfigCategory object

This table shows the Custom Object Definition Details for the ConfigCategory object:

Custom Object	Definition Detail
Singular Label	ConfigCategory
Plural Label	ConfigCategories
Object Name	ConfigCategory
API Name	ConfigCategory__c

This table shows the standard fields on the ConfigCategory object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
ID	Name	Auto Number
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)

This table shows the custom fields and relationships on the ConfigCategory object:

Field Label	Field Name	API Name	Data Type
CategoryName	CategoryName	CategoryName__c	Text(200) (Unique Case Insensitive)
Parent Category	parent_id	parent_id__c	Lookup(ConfigCategory)

ConfigCategoryProp object

This table shows the Custom Object Definition Details for the ConfigCategoryProp object:

Custom Object	Definition Detail
Singular Label	ConfigCategoryProp
Plural Label	ConfigCategoryProp
Object Name	ConfigCategoryProp
API Name	ConfigCategoryProp__c

This table shows the standard fields on the ConfigCategoryProp object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Id	Name	Auto Number
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)

This table shows the custom fields and relationships on the ConfigCategoryProp object:

Field Label	Field Name	API Name	Data Type
ConfigCategory	ConfigCategory	ConfigCategory__c	Lookup(ConfigCategory)
Property Name	prop_name	prop_name__c	Text(200) (Unique Case Insensitive)
Property Value	prop_value	prop_value__c	Text(200)

Contact Bill-to Role object

This table shows the Custom Object Definition Details for the Contact Bill-to Role object:

Custom Object	Definition Detail
Singular Label	Contact Bill-to Role
Plural Label	Contact Bill-to Roles
Object Name	contactbilltorole
API Name	contactbilltorole__c

This table shows the standard fields on the Contact Bill-to Role object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
ID	Name	Auto Number
Last Modified By	LastModifiedBy	Lookup(User)

This table shows the custom fields and relationships on the Contact Bill-to Role object:

Field Label	Field Name	API Name	Data Type
Bill-to	billto	billto__c	Master-Detail(Bill-to)
Contact	Contact	Contact__c	Master-Detail(Contact)
Primary Contact	isPrimary	isPrimary__c	Checkbox
Role	role	role__c	Picklist

Contact Messenger object

This table shows the Custom Object Definition Details for the Contact Messenger object:

Custom Object	Definition Detail
Singular Label	Contact Messenger
Plural Label	Messengers
Object Name	contactmessenger
API Name	contactmessenger__c

This table shows the standard fields on the Contact Messenger object:

Field Label	Field Name	Data Type
Contact Messenger Name	Name	Auto Number
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)

This table shows the custom fields and relationships on the Contact Messenger object:

Field Label	Field Name	API Name	Data Type
Contact	Contact	Contact__c	Master-Detail(Contact)
Messenger Type	messengertype	messengertype__c	Picklist

Field Label	Field Name	API Name	Data Type
URI	uri	uri__c	Text(255)

Contact PayFrom Role object

This table shows the Custom Object Definition Details for the Contact PayFrom Role object:

Custom Object	Definition Detail
Singular Label	Contact PayFrom Role
Plural Label	Contact PayFrom Roles
Object Name	contactpayfromrole
API Name	contactpayfromrole__c

This table shows the standard fields on the Contact PayFrom Role object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Name	Name	Auto Number

This table shows the custom fields and relationships on the Contact PayFrom Role object:

Field Label	Field Name	API Name	Data Type
Contact	Contact	Contact__c	Master-Detail(Contact)
Pay From	payfrom	payfrom__c	Master-Detail(Pay-from)
Primary Contact	isPrimary	isPrimary__c	Checkbox
Role	role	role__c	Picklist

Contact Shipto Role object

This table shows the Custom Object Definition Details for the Contact Shipto Role object:

Custom Object	Definition Detail
Singular Label	Contact Shipto Role

Custom Object	Definition Detail
Plural Label	Contact Ship-to Roles
Object Name	shiptocontactrole
API Name	shiptocontactrole__c

This table shows the standard fields on the Contact Shipto Role object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
ID	Name	Auto Number
Last Modified By	LastModifiedBy	Lookup(User)

This table shows the custom fields and relationships on the Contact Shipto Role object:

Field Label	Field Name	API Name	Data Type
Contact	Contact	Contact__c	Master-Detail(Contact)
Primary Contact	isPrimary	isPrimary__c	Checkbox
Role	role	role__c	Picklist
Ship-to	Shipto	Shipto__c	Master-Detail(Ship-to)

Customer Return object

This table shows the Custom Object Definition Details for the Customer Return object:

Custom Object	Definition Detail
Singular Label	Customer Return
Plural Label	Customer Returns
Object Name	customerreturn
API Name	customerreturn__c

This table shows the standard fields on the Customer Return object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Customer Return Name	Name	Text(80)

Custom objects and tabs

Field Label	Field Name	Data Type
Last Modified By	LastModifiedBy	Lookup(User)

This table shows the custom fields and relationships on the Customer Return object:

Field Label	Field Name	API Name	Data Type
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text(100)
Bill-to	billto	billto__c	Lookup(Bill-to)
Bill-to City	billtocity	billtocity__c	Text(100)
Bill-to Contact Name	billto_contactname	billto_contactname__c	Formula (Text)
Bill-to Country	billtocountry	billtocountry__c	Text(100)
Bill-to Name	billtoname	billtoname__c	Text(255)
Bill-to State	billtostate	billtostate__c	Text(100)
Bill-to Street	billtostreet	billtostreet__c	Long Text Area(256)
Bill-to Zip	billtozip	billtozip__c	Text(100)
Can Send Bod	cansendbod	cansendbod__c	Checkbox
Carrier Code	carriercode	carriercode__c	Text(50)
Carrier Name	carriername	carriername__c	Text(100)
Customer Order Number	custordernumber	custordernumber__c	Text(100)
Customer Return Id	extRecordId	extRecordId__c	Text(255)
Extended Amount	extendedamount	extendedamount__c	Currency(16, 2)
Ext Location ID	extlocationid	extlocationid__c	Text(100)
Inco Term	incotermid	incotermid__c	Lookup(Lookup)
In Sync	InSync	InSync__c	Checkbox
Location ID	locationid	locationid__c	Text(100)
Ownership Transfer	ownershiptransfer	ownershiptransfer__c	Text(50)
Payment Method	paymentmethod	paymentmethod__c	Text(50)
Payment Term	paymenttermid	paymenttermid__c	Lookup(Lookup)
Price List	pricebook	pricebook__c	Text(255)
Promise Return date	promisereturndate	promisereturndate__c	Date/Time
Sold-to	account	account__c	Master-Detail(Account)
Sold-to City	soldtocity	soldtocity__c	Text(100)

Field Label	Field Name	API Name	Data Type
Sold-to Contact Name	soldto_contactname	soldto_contactname__c	Formula (Text)
Sold-to Name	soldtoname	soldtoname__c	Text(255)
Sold-to State	soldtostate	soldtostate__c	Text(100)
Sold-to Street	soldtostreet	soldtostreet__c	Long Text Area(256)
Sold-to Zip	soldtozip	soldtozip__c	Text(100)
Source ID	extsourceid	extsourceid__c	Text(100)
Status	statuscode	statuscode__c	Picklist
Unique ID	extid	extid__c	Text(100) (External ID) (Unique Case In-sensitive)
Variation Id	variationid	variationid__c	Number(18, 0)
zz_Bill-to Address	billtoaddress	billtoaddress__c	Lookup(zz_Transaction Address)
zz_Bill-to City	billtocity	billtocity__c	Formula (Text)
zz_Bill-to Country	billtocountry	billtocountry__c	Formula (Text)
zz_Bill-to Line 1	billtoline1	billtoline1__c	Formula (Text)
zz_Bill-to Line 2	billtoline2	billtoline2__c	Formula (Text)
zz_Bill-to Line 3	billtoline3	billtoline3__c	Formula (Text)
zz_Bill-to Line 4	billtoline4	billtoline4__c	Formula (Text)
zz_Bill-to Line 5	billtoline5	billtoline5__c	Formula (Text)
zz_Bill-to Line 6	billtoline6	billtoline6__c	Formula (Text)
zz_Bill-to State/Province	billtostateorprovince	billtostateorprovince__c	Formula (Text)
zz_Bill-to Zip/Postal Code	billtopostalcode	billtopostalcode__c	Formula (Text)
zz_Sold-to Address	soldtoaddress	soldtoaddress__c	Lookup(zz_Transaction Address)
zz_Sold-to City	soldtocity	soldtocity__c	Formula (Text)
zz_Sold-to Country	soldtocountry	soldtocountry__c	Formula (Text)
zz_Sold-to Line 1	soldtoline1	soldtoline1__c	Formula (Text)
zz_Sold-to Line 2	soldtoline2	soldtoline2__c	Formula (Text)
zz_Sold-to Line 3	soldtoline3	soldtoline3__c	Formula (Text)

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
zz_Sold-to Line 4	soldtoline4	soldtoline4__c	Formula (Text)
zz_Sold-to Line 5	soldtoline5	soldtoline5__c	Formula (Text)
zz_Sold-to Line 6	soldtoline6	soldtoline6__c	Formula (Text)
zz_Sold-to State/Province	soldtostateorprovince	soldtostateorprovince__c	Formula (Text)
zz_Sold-to Zip/Postal Code	soldtopostalcode	soldtopostalcode__c	Formula (Text)

Customer Return Line object

This table shows the Custom Object Definition Details for the Customer Return Line object:

Custom Object	Definition Detail
Singular Label	Customer Return Line
Plural Label	Customer Return Lines
Object Name	customerreturnline
API Name	customerreturnline__c

This table shows the standard fields on the Customer Return Line object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Customer Return Line Number	Name	Text(80)
Last Modified By	LastModifiedBy	Lookup(User)

This table shows the custom fields and relationships on the Customer Return Line object:

Field Label	Field Name	API Name	Data Type
Accounting Entity	extaccountingentityid	extaccountingentityid__c	Text(100)
Carrier Code	carriercode	carriercode__c	Text(50)
Carrier Name	carriername	carriername__c	Text(100)
Customer Return	customerreturn	customerreturn__c	Master-Detail(Customer Return)
Document Number	documentNumber	documentNumber__c	Formula (Text)

Field Label	Field Name	API Name	Data Type
Existing Product	productid	productid__c	Lookup(Product)
Extended Amount	extendedamount	extendedamount__c	Currency(16, 2)
Inco Term	incotermid	incotermid__c	Lookup(Lookup)
Line Item Number	lineitemnumber	lineitemnumber__c	Number(18, 0)
Location Id	locationid	locationid__c	Text(100)
Note	note2	note2__c	Long Text Area(32000)
Note	note	note__c	Text(100)
Ownership Transfer	ownershiptransfer	ownershiptransfer__c	Text(200)
Payment Term	paymenttermid	paymenttermid__c	Lookup(Lookup)
Price Per Price Unit	priceperpriceunit	priceperpriceunit__c	Currency(16, 2)
Price Per Price Uom	priceperpriceuom	priceperpriceuom__c	Text(20)
Price Per Unit	priceperunit	priceperunit__c	Currency(16, 2)
Product Description	productdescription	productdescription__c	Long Text Area(1024)
Quantity	quantity	quantity__c	Number(16, 2)
Required Delivery Date	requireddeliverydate	requireddeliverydate__c	Date/Time
Select Product	isproductoverridden	isproductoverridden__c	Picklist
Ship-to Location	shipto_locationcode	shipto_locationcode__c	Text(50)
Ship-to Location Name	shipto_locationname	shipto_locationname__c	Text(100)
Status	statuscode	statuscode__c	Picklist
UOM	uomid	uomid__c	Lookup(UOM)
Write-In Product	writeinproduct	writeinproduct__c	Text(100)

Inbound Message object

This table shows the Custom Object Definition Details for the Inbound Message object:

Custom Object	Definition Detail
Singular Label	Inbound Message
Plural Label	Inbound Messages

Custom objects and tabs

Custom Object	Definition Detail
Object Name	ioninboundmessage
API Name	ioninboundmessage__c

This table shows the standard fields on the Inbound Message object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Message ID	Name	Text(80)
Owner	Owner	Lookup(User, Queue)

This table shows the custom fields and relationships on the Inbound Message object:

Field Label	Field Name	API Name	Data Type
Bod Xml	bodxml	bodxml__c	Long Text Area(32000)
Error Message	errormessage	errormessage__c	Long Text Area(2000)
Header Xml	headerxml	headerxml__c	Long Text Area(32000)
Marked As Processed	markedasprocessed	markedasprocessed__c	Number(1, 0)
Message Priority	messagepriority	messagepriority__c	Number(5, 0)
Message Type	messagetype	messagetype__c	Text(255)
Processing Status	processingstatus	processingstatus__c	Picklist
Related logger	relatedloggerId	relatedloggerId__c	Text(20)
Related Logger URL	relatedloggerurl	relatedloggerurl__c	Formula (Text)
Related Record ExtId	relatedrecordextId	relatedrecordextId__c	Text(100)
Related Record SFId	relatedrecordsfid	relatedrecordsfid__c	Text(100)
Related Record URL	relatedrecordurl	relatedrecordurl__c	Formula (Text)
Retry Count	retrycount	retrycount__c	Number(5, 0)
Was Processed	wasprocessed	wasprocessed__c	Number(18, 0)

Infor quote object

This table shows the Custom Object Definition Details for the Infor Quote object:

Custom Object	Definition Detail
Singular Label	Infor quote
Plural Label	Infor Quotes
Object Name	quote
API Name	quote__c

This table shows the standard fields on the Infor quote object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)
Quote Name	Name	Text(80)
Record Type	RecordType	Record Type

This table shows the custom fields and relationships on the Infor Quote object:

Field Label	Field Name	API Name	Data Type
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text(100)
Account Name	account	account__c	Lookup(Account)
Additional-to City	additionaltocity	additionaltocity__c	Text(255)
Additional-to Country	additionaltocountry	additionaltocountry__c	Text(255)
Additional-to Name	additionaltoname	additionaltoname__c	Text(255)
Additional-to State/Province	additionaltostateorprovince	additionaltostateor-province__c	Text(255)
Additional-to Street	additionaltostreet	additionaltostreet__c	Text Area(255)
Additional-to Zip/Postal Code	additionaltopostalcode	additionaltopostalcode__c	Text(255)
Bill-to	billto	billto__c	Lookup(Bill-to)
Bill-to City	billtocity	billtocity__c	Text(100)
Bill-to Contact	billto_contactid	billto_contactid__c	Lookup(Contact)
Bill-to Contact Name	billto_contactname	billto_contactname__c	Formula (Text)

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Bill-to Country	billtocountry	billtocountry__c	Text(100)
Bill-to Name	billtoname	billtoname__c	Text(255)
Bill-to Postal Code	billtopostalcode	billtopostalcode__c	Text(255)
Bill-to State/Province	billtostateorprovince	billtostateorprovince__c	Text(255)
Bill-to Street	billtostreet	billtostreet__c	Long Text Area(256)
Can Send Bod	cansendbod	cansendbod__c	Checkbox
Carrier Code	carriercode	carriercode__c	Text(50)
Carrier Name	carriername	carriername__c	Text(100)
Contact Name	contact	contact__c	Lookup(Contract)
Department	department	department__c	Text(255)
Description	description	description__c	Long Text Area(32000)
Effective From	effectivefrom	effectivefrom__c	Date/Time
Email	email	email__c	Email
ERP Extended Amount	erpextendedamount	erpextendedamount__c	Currency(16, 2)
ERP Grand Total	totalamount	totalamount__c	Currency(16, 2)
ERP Status	statuscode	statuscode__c	Picklist
ERP Tax	erptax	erptax__c	Formula (Currency)
ERP Tax %	erptaxpercent	erptaxpercent__c	Formula (Percent)
Expiration Date	expirationdate	expirationdate__c	Date
Expire On	expireon	expireon__c	Date/Time
External Sales Rep Code	externalsalesrepcode	externalsalesrepcode__c	Text(255)
External Sales Rep Name	externalsalesrepname	externalsalesrepname__c	Text(255)
Fax	fax	fax__c	Phone
Freight Term Code	freighttermcode	freighttermcode__c	Text(255)
Global Discount	globaldiscount	globaldiscount__c	Formula (Currency)
Global Discount %	discount	discount__c	Percent(3, 2)
Grand Total	grandtotal	grandtotal__c	Formula (Currency)
Inco Term	incotermid	incotermid__c	Lookup(Lookup)

Field Label	Field Name	API Name	Data Type
In Sync	InSync	InSync__c	Checkbox
Internal Sales Rep Code	internalsalesrepcode	internalsalesrepcode__c	Text(255)
Internal Sales Rep Name	internalsalesrepname	internalsalesrepname__c	Text(255)
Line Items Count	lineitemcount	lineitemcount__c	Roll-Up Summary (COUNT Infor quote Line Item)
Location ID	locationid	locationid__c	Text(100)
Logical ID	logicalid	logicalid__c	Text(255)
Net Price	totalprice	totalprice__c	Formula (Currency)
Opportunity Name	opportunity	opportunity__c	Lookup(Opportunity)
Other Phone	otherphone	otherphone__c	Phone
Pay-from	payfrom	payfrom__c	Lookup(Pay-from)
Pay-from City	payfromcity	payfromcity__c	Text(255)
Pay-from Contact	payfromcontactid	payfromcontactid__c	Lookup(Contact)
Pay-from Contact Name	payfromcontactname	payfromcontactname__c	Text(255)
Pay-from Country	payfromcountry	payfromcountry__c	Text(255)
Pay-from Name	payfromname	payfromname__c	Text(255)
Pay-from Postal Code	payfrompostalcode	payfrompostalcode__c	Text(255)
Pay-from State/Province	payfromstateorprovince	payfromstateorprovince__c	Text(255)
Pay-from Street	payfromstreet	payfromstreet__c	Text(255)
Payment Term	paymenttermid	paymenttermid__c	Lookup(Lookup)
Pricebook2Id	pricebook2Id	pricebook2Id__c	Text(20)
Price Book Name	pricebook2Name	pricebook2Name__c	Text(255)
Probability	probability	probability__c	Number(16, 2)
Quote Id	extRecordId	extRecordId__c	Text(255)
Quote Note	statusnote	statusnote__c	Long Text Area(32768)
Quote Number	quotenumber	quotenumber__c	Autonumber
Quote-to City	quotetocity	quotetocity__c	Text(255)

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Quote-to Country	quotetocountry	quotetocountry__c	Text(255)
Quote-to Name	quotetoname	quotetoname__c	Text(255)
Quote-to State/Province	quotetostateorprovince	quotetostateorprovince__c	Text(255)
Quote-to Street	quotetostreet	quotetostreet__c	Text Area(255)
Quote-to Zip/Postal Code	quotetopostalcode	quotetopostalcode__c	Text(255)
Reason	statusreason	statusreason__c	Picklist
Requested Delivery By	requesteddeliveryby	requesteddeliveryby__c	Date/Time
RFQ Number	rfqnumber	rfqnumber__c	Text(255)
Ship Complete Flag	shipcompleteflag	shipcompleteflag__c	Checkbox
Shipping and Handling	shippinghandling	shippinghandling__c	Currency(16, 2)
Ship-to	shipto	shipto__c	Lookup(Ship-to)
Ship-to City	shiptocity	shiptocity__c	Text(255)
Ship-to Contact	shiptocontactid	shiptocontactid__c	Lookup(Contact)
Ship-to Contact Name	shiptocontactname	shiptocontactname__c	Text(255)
Ship-to Country	shiptocountry	shiptocountry__c	Text(255)
Ship-to Name	shiptoname	shiptoname__c	Text(255)
Ship-to Postal Code	shiptopostalcode	shiptopostalcode__c	Text(255)
Ship-to State/Province	shiptostateorprovince	shiptostateorprovince__c	Text(255)
Ship-to Street	shiptostreet	shiptostreet__c	Text(255)
Sold-to City	soldtocity	soldtocity__c	Text(100)
Sold-to Contact Name	soldtocontactname	soldtocontactname__c	Text(255)
Sold-to Country	soldtocountry	soldtocountry__c	Text(255)
Sold-to Name	soldtoname	soldtoname__c	Text(255)
Sold-to State/Province	soldtostateorprovince	soldtostateorprovince__c	Text(255)
Sold-to Street	soldtostreet	soldtostreet__c	Long Text Area(256)
Status	statuscode	statuscode__c	Picklist

Field Label	Field Name	API Name	Data Type
Syncing	issyncing	issyncing__c	Checkbox
Tax	tax	tax__c	Formula (Currency)
Tax %	taxpercent	taxpercent__c	Percent(3, 2)
TemplateQuoteId	templatequoteid	templatequoteid__c	Text(20)
Total Line Discount	totallinediscount	totallinediscount__c	Roll-Up Summary (SUM Infor quote Line Item)
Total Line Discount %	totallinediscountpercent	totallinediscountpercent__c	Formula (Percent)
Total Line Extended Amount	subtotal	subtotal__c	Roll-Up Summary (SUM Infor quote Line Item)
Total Line Net Amount	totallinenetamount	totallinenetamount__c	Roll-Up Summary (SUM Infor quote Line Item)
Unique ID	extid	extid__c	Text(100) (External ID) (Unique Case In-sensitive)
Variation Id	variationid	variationid__c	Number(18, 0)

Infor quote Clone Setting object

This table shows the Custom Object Definition Details for the Infor Quote Clone Setting object:

Custom Object	Definition Detail
Singular Label	Infor Quote Clone Setting
Plural Label	Infor Quote Clone Setting
Object Name	quotecloneconfig
API Name	quotecloneconfig__c

This table shows the standard fields on the Infor Quote Clone Setting object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)

Custom objects and tabs

Field Label	Field Name	Data Type
Name	Name	Text(80)
Owner	Owner	Lookup(User, Queue)

This table shows the custom fields and relationships on the Infor Quote Clone Setting object:

Field Label	Field Name	API Name	Data Type
Default Value	Default_Value	Default_Value__c	Text(100)
Field Name	Field_Name	Field_Name__c	Text(100)
Field Type	FieldType	FieldType__c	Text(100)
Object Name	Object_Name	Object_Name__c	Text(100)
Override	OverrideField	OverrideField__c	Checkbox
Unique Name	Unique_ID	Unique_ID__c	Text(255) (Unique Case Sensitive)

Infor quote Line Item object

This table shows the Custom Object Definition Details for the Infor Quote Line Item object:

Custom Object	Definition Detail
Singular Label	Infor Quote Line Item
Plural Label	Infor Quote Line Items
Object Name	QuoteLineItem
API Name	QuoteLineItem__c

This table shows the standard fields on the Infor Quote Line Item object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Line Item Number	Name	Auto Number
Record Type	RecordType	Record Type

This table shows the custom fields and relationships on the Infor Quote Line Item object:

Field Label	Field Name	API Name	Data Type
Date	servicedate	servicedate__c	Date
ERP Line Number	linenumber	linenumber__c	Number(18, 0)
ERP Status	statuscode	statuscode__c	Picklist
ERP Total Amount	totalamount	totalamount__c	Currency(14, 4)
Existing Product Name	productid	productid__c	Lookup(Product)
Extended Amount	extendedamount	extendedamount__c	Currency(14, 4)
Extended Cost	extendedcost	extendedcost__c	Currency(14, 4)
Included With Sync	includeinsync	includeinsync__c	Checkbox
Inco Term	incotermid	incotermid__c	Lookup(Lookup)
Is Price Overridden	ispriceoverridden	ispriceoverridden__c	Checkbox
Line Discount	linediscount	linediscount__c	Formula (Currency)
Line Discount %	discount	discount__c	Percent(14, 4)
Line Extended Amount	subtotal	subtotal__c	Formula (Currency)
Line Item Description	description	description__c	Text(255)
Line Net Amount	totalprice	totalprice__c	Formula (Currency)
List Price	listprice	listprice__c	Currency(14, 4)
Market ID	marketid	marketid__c	Lookup(Lookup)
OpportunityLineId	opportunitylineid	opportunitylineid__c	Text(20)
Ownership Transfer	ownershiptransfer	ownershiptransfer__c	Text(255)
PricebookEntryId	pricebookEntryId	pricebookEntryId__c	Text(20)
Price Per Price Unit	priceperpriceunit	priceperpriceunit__c	Currency(14, 4)
Price Per Price Uom	priceperpriceuom	priceperpriceuom__c	Text(10)
Price Per Unit	priceperunit	priceperunit__c	Currency(14, 4)
Probability	probability	probability__c	Number(14, 4)
Product	product2	product2__c	Lookup(Product)
Product Code	productcode	productcode__c	Text(255)
Product Description	productdescription	productdescription__c	Long Text Area(1024)
Promised Ship Date	promisedshipdate	promisedshipdate__c	Date/Time
Quantity	quantity	quantity__c	Number(14, 4)
Quote Name	quote	quote__c	Master-Detail(Infor quote)

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Select Product	isproductoverridden	isproductoverridden__c	Picklist
Ship Complete Flag	shipcompleteflag	shipcompleteflag__c	Checkbox
Ship-to	shipto	shipto__c	Lookup(Ship-to)
Ship-to City	shiptocity	shiptocity__c	Text(50)
Ship-to Contact Id	shiptocontactid	shiptocontactid__c	Text(255)
Ship-to Contact Name	shiptocontactname	shiptocontactname__c	Text(100)
Ship-to Country/Region	shiptocountry	shiptocountry__c	Text(50)
Ship-to Location	shiptolocation	shiptolocation__c	Text(100)
Ship-to Name	shiptoname	shiptoname__c	Text(100)
Ship-to State/Province	shiptostateorprovince	shiptostateorprovince__c	Text(50)
Ship-to Street	shiptostreet	shiptostreet__c	Text Area(255)
Ship-to Zip/Postal Code	shiptopostalcode	shiptopostalcode__c	Text(20)
Sync with Oppty	syncWithOpportunity	syncWithOpportunity__c	Checkbox
Tax	tax	tax__c	Currency(14, 4)
Unit	uomid	uomid__c	Lookup(UOM)
Unit Price	unitprice	unitprice__c	Currency(14, 4)
Warehouse City	warehousecity	warehousecity__c	Text(50)
Warehouse Code	warehousecode	warehousecode__c	Text(255)
Warehouse Contact Name	warehousecontactname	warehousecontact-name__c	Text(100)
Warehouse Country/Region	warehousecountry	warehousecountry__c	Text(50)
Warehouse Line 3	warehouseline3	warehouseline3__c	Text(50)
Warehouse Location	warehouselocation	warehouselocation__c	Text(100)
Warehouse Name	warehousename	warehousename__c	Text(100)
Warehouse State/Province	warehousestateorprovince	warehousestateorprovince__c	Text(50)
Warehouse Street	warehousestreet	warehousestreet__c	Text Area(255)
Warehouse Zip/Postal Code	warehousepostalcode	warehousepostalcode__c	Text(20)
Write-In Product Name	writeinproduct	writeinproduct__c	Text(100)

Invoice object

This table shows the Custom Object Definition Details for the Invoice object:

Custom Object	Definition Detail
Singular Label	Invoice
Plural Label	Invoices
Object Name	invoice
API Name	invoice__c

This table shows the standard fields on the Invoices object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Invoice Name	Name	Text(80)
Last Modified By	LastModifiedBy	Lookup(User)

This table shows the custom fields and relationships on the Invoices object:

Field Label	Field Name	API Name	Data Type
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text(255)
Bill-to	billto	billto__c	Lookup(Bill-to)
Bill-to City	billtocity	billtocity__c	Text(100)
Bill-to Contact ID	billtocontactid	billtocontactid__c	Lookup(Contact)
Bill-to Contact Name	billtocontactname	billtocontactname__c	Formula (Text)
Bill-to Country	billtocountry1	billtocountry1__c	Text(100)
Bill-to Name	billtoname	billtoname__c	Text(255)
Bill-to State	billtostate	billtostate__c	Text(100)
Bill-to Street	billtostreet	billtostreet__c	Long Text Area(256)
Bill-to Zip	billtozip	billtozip__c	Text(100)
Can Send Bod	cansendbod	cansendbod__c	Checkbox
Contact	contact	contact__c	Lookup(Contact)
Customer	account	account__c	Master-Detail(Account)

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Description	description	description__c	Long Text Area(1024)
Discount Amount	discountamount	discountamount__c	Currency(16, 2)
Due Date	duedate	duedate__c	Date/Time
Extended Amount	extendedamount	extendedamount__c	Currency(16, 2)
In Sync	InSync	InSync__c	Checkbox
Invoice Id	extRecordId	extRecordId__c	Text (255)
Late Payment Amount	latepaymentamount	latepaymentamount__c	Currency(16, 2)
Late Payment Due Date	latepaymentduedate	latepaymentduedate__c	Date/Time
Location ID	locationid	locationid__c	Text (255)
Logical ID	extlogicalid	extlogicalid__c	Text (255)
Payment Term	paymenttermid	paymenttermid__c	Lookup(Lookup)
Price List	pricebook	pricebook__c	Text(255)
Sales Contact Name	salescontactname	salescontactname__c	Text(255)
Sold-to City	soldtocity1	soldtocity1__c	Text(100)
Sold-to Contact Name	soldtocontactname	soldtocontactname__c	Formula (Text)
Sold-to Country	soldtocountry1	soldtocountry1__c	Text(100)
Sold-to Name	soldtoname	soldtoname__c	Text(255)
Sold-to State	soldtostate	soldtostate__c	Text(100)
Sold-to Street	soldtostreet	soldtostreet__c	Long Text Area(256)
Sold-to Zip	soldtozip	soldtozip__c	Text(100)
Status	statuscode	statuscode__c	Picklist
Supplier Name	suppliername	suppliername__c	Text(255)
Tax Basis Amount	taxbasisamount	taxbasisamount__c	Currency(16, 2)
Tax Exempt Amount	taxexemptamount	taxexemptamount__c	Currency(16, 2)
Total Amount	totalamount	totalamount__c	Currency(16, 2)
Unique ID	extid	extid__c	Text(100) (External ID) (Unique Case Insensitive)

Field Label	Field Name	API Name	Data Type
Variation Id	variationid	variationid__c	Number(18, 0)
zz_Bill-to Address	billtoaddress	billtoaddress__c	Lookup(zz_Transaction Address)
zz_Bill-to City	billtocity	billtocity__c	Formula (Text)
zz_Bill-to Country	billtocountry	billtocountry__c	Formula (Text)
zz_Bill-to Line 1	billtoline1	billtoline1__c	Formula (Text)
zz_Bill-to Line 2	billtoline2	billtoline2__c	Formula (Text)
zz_Bill-to Line 3	billtoline3	billtoline3__c	Formula (Text)
zz_Bill-to Line 4	billtoline4	billtoline4__c	Formula (Text)
zz_Bill-to Line 5	billtoline5	billtoline5__c	Formula (Text)
zz_Bill-to Line 6	billtoline6	billtoline6__c	Formula (Text)
zz_Bill-to State/Province	billtostateorprovince	billtostateorprovince__c	Formula (Text)
zz_Bill-to Zip/Postal Code	billtopostalcode	billtopostalcode__c	Formula (Text)
zz_Sold-to Address	soldtoaddress	soldtoaddress__c	Lookup(zz_Transaction Address)
zz_Sold-to City	soldtocity	soldtocity__c	Formula (Text)
zz_Sold-to Country	soldtocountry	soldtocountry__c	Formula (Text)
zz_Sold-to Line 1	soldtoline1	soldtoline1__c	Formula (Text)
zz_Sold-to Line 2	soldtoline2	soldtoline2__c	Formula (Text)
zz_Sold-to Line 3	soldtoline3	soldtoline3__c	Formula (Text)
zz_Sold-to Line 4	soldtoline4	soldtoline4__c	Formula (Text)
zz_Sold-to Line 5	soldtoline5	soldtoline5__c	Formula (Text)
zz_Sold-to Line 6	soldtoline6	soldtoline6__c	Formula (Text)
zz_Sold-to State/Province	soldtostateorprovince	soldtostateorprovince__c	Formula (Text)
zz_Sold-to Zip/Postal Code	soldtopostalcode	soldtopostalcode__c	Formula (Text)
zz_Bill-to Line 1	billtoline1	billtoline1__c	Formula
zz_Bill-to Line 2	billtoline2	billtoline2__c	Formula
zz_Bill-to Line 3	billtoline3	billtoline3__c	Formula
zz_Bill-to Line 4	billtoline4	billtoline4__c	Formula

Field Label	Field Name	API Name	Data Type
zz_Bill-to Line 5	billtoline5	billtoline5__c	Formula
zz_Bill-to Line 6	billtoline6	billtoline6__c	Formula

Invoice Line object

This table shows the Custom Object Definition Details for the Invoice Line object:

Custom Object	Definition Detail
Singular Label	Invoice Line
Plural Label	Invoice Lines
Object Name	invoiceline
API Name	invoiceline__c

This table shows the standard fields on the Invoice Line object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Invoice Line Number	Name	Text(80)
Last Modified By	LastModifiedBy	Lookup(User)

This table shows the custom fields and relationships on the Invoice Line object:

Field Label	Field Name	API Name	Data Type
Address Contact	shiptocontactname	shiptocontactname__c	Text(100)
Allowance Amount	allowanceamount	allowanceamount__c	Currency(14, 4)
Charge Amount	chargeamount	chargeamount__c	Currency(14, 4)
Classification Code	ItemClassification	ItemClassification__c	Lookup(Lookup)
Country Of Origin	countryoforigin	countryoforigin__c	Text(255)
Customer PO	customerpo	customerpo__c	Text(255)
Customer Return Number	returnordernumber	returnordernumber__c	Lookup(Customer Return)
Description	description	description__c	Long Text Area(1024)
Existing Product	productid	productid__c	Lookup(Product)

Field Label	Field Name	API Name	Data Type
Extended Amount	extendedamount	extendedamount__c	Currency(14, 4)
Extended Cost	extendedcost	extendedcost__c	Currency(14, 4)
Invoice	invoice	invoice__c	Master-Detail(Invoice)
Is Price Overridden	ispriceoverridden	ispriceoverridden__c	Checkbox
Line Number	linenumber	linenumber__c	Number(18, 0)
Order Line Number	orderlinenumber	orderlinenumber__c	Number(18, 0)
Price Per Price Unit	priceperpriceunit	priceperpriceunit__c	Currency(14, 4)
Price Per Price Uom	priceperpriceuom	priceperpriceuom__c	Text(10)
Price Per Unit	priceperunit	priceperunit__c	Currency(14, 4)
Product Serial Number	productserialnumber	productserialnumber__c	Text(255)
Quantity	quantity	quantity__c	Number(14, 4)
Sales Order Number	ordernumber	ordernumber__c	Lookup
Select Product	isproductoverridden	isproductoverridden__c	Picklist
Ship-to	shipto	shipto__c	Lookup
Ship-to Line 1	shiptoline1	shiptoline1__c	Text (50)
Ship-to Line 2	shiptoline2	shiptoline2__c	Text (50)
Ship-to Line 3	shiptoline3	shiptoline3__c	Text (50)
Ship-to Line 4	shiptoline4	shiptoline4__c	Text (50)
Ship-to Line 5	shiptoline5	shiptoline5__c	Text (50)
Ship-to Line 6	shiptoline6	shiptoline6__c	Text (50)
Ship-to Location	shiptolocation	shiptolocation__c	Text (100)
Ship-to Name	shiptoname	shiptoname__c	Text (100)
Ship-to State/Province	shiptostateorprovince	shiptostateorprovince__c	Text (50)
Ship-to Zip/Postal Code	shiptopostalcode	shiptopostalcode__c	Text (20)
Status	statuscode	statuscode__c	Picklist
Supplier	Supplier	Supplier__c	Text (64)
Supplier ID	Supplier_ID	Supplier_ID__c	Text (100)
Tax	tax	tax__c	Currency

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Tax Code	taxcode	taxcode__c	Text (255)
Tax Description	taxdescription	taxdescription__c	Text (255)
Total Amount	totalamount	totalamount__c	Currency
Unit	uomid	uomid__c	Lookup
Write-In Product Description	productdescription	productdescription__c	Long Text Area
Write-In Product Id	writeinproduct	writeinproduct__c	Text (100)

Logger object

This table shows the Custom Object Definition Details for the Logger object:

Custom Object	Definition Detail
Singular Label	Logger
Plural Label	Loggers
Object Name	logger
API Name	logger__c

This table shows the standard fields on the Logger object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup (User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup (User)
Logger Name	Name	Text (80)
Owner	Owner	Lookup (User, Queue)

This table shows the custom fields and relationships on the Logger object:

Field Label	Field Name	API Name	Data Type
Entity	entity	entity__c	Text (255)
Message	message	message__c	Long Text Area
Message SF Id	messagesfid	messagesfid__c	Text (18)
Message Type	messagetype	messagetype__c	Picklist
Related Entity URL	relatedentityurl	relatedentityurl__c	Formula

Lookup object

This table shows the Custom Object Definition Details for the Lookup object:

Custom Object	Definition Detail
Singular Label	Lookup
Plural Label	Lookups
Object Name	lookup
API Name	lookup__c

This table shows the standard fields on the Lookup object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Name	Name	Text(80)

This table shows the custom fields and relationships on the Lookup object:

Field Label	Field Name	API Name	Data Type
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text(255)
Code	code	code__c	Text(128)
Description	description	description__c	Long Text Area(1024)
ID	extRecordId	extRecordId__c	Text(255)
Location ID	locationid	locationid__c	Text(255)
Lookup Category	lookupcategory	lookupcategory__c	Master-Detail(Lookup Category)
Message Source	Message_Source	Message_Source__c	Lookup(Message Source)
Status	statuscode	statuscode__c	Picklist
Unique ID	extid	extid__c	Text(255) (External ID) (Unique Case Insensitive)
Variation ID	variationId	variationId__c	Number(18, 0)

Lookup Category object

This table shows the Custom Object Definition Details for the Lookup Categories object:

Custom Object	Definition Detail
Singular Label	Lookup Category
Plural Label	Lookup Categories
Object Name	lookupcategory
API Name	lookupcategory__c

This table shows the standard fields on the Lookup Categories object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Lookup Category name	Name	Text(80)
Owner	Owner	Lookup(User, Queue)

This table shows the custom fields and relationships on the Lookup Categories object:

Field Label	Field Name	API Name	Data Type
Lookup Category ID	extid	extid__c	Text(255) (External ID) (Unique Case Insensitive)
Message Source	Message_Source	Messages_Source__c	Lookup(Message Source)

Outbound Confirm BOD object

This table shows the Custom Object Definition Details for the Outbound Confirm BOD object:

Custom Object	Definition Detail
Singular Label	Outbound Confirm BOD
Plural Label	Outbound Confirm BODs
Object Name	Confirm
API Name	Confirm__c

This table shows the standard fields on the Outbound Confirm BOD object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Name	Name	Text(80)
Owner	Owner	Lookup(User, Queue)

This table shows the custom fields and relationships on the Outbound Confirm BOD object:

Field Label	Field Name	API Name	Data Type
cansendbod	cansendbod	cansendbod__c	Checkbox
Error Message	errorMessage	errorMessage__c	Long Text Area(2000)
Error Stack Trace	errorStackTrace	errorStackTrace__c	Long Text Area(32000)
InSync	InSync	InSync__c	Checkbox
Message Source	message_source	message_source__c	Lookup(Message Source)
Original Inbound Message	inboundMessageId	inboundMessageId__c	Lookup(Inbound Message)
Status	statusCode	statusCode__c	Picklist
Unique ID	extId	extId__c	Text(255) (External ID)

Outbound Message object

This table shows the Custom Object Definition Details for the Outbound Message object:

Custom Object	Definition Detail
Singular Label	Outbound Message
Plural Label	Outbound Messages
Object Name	ionoutboundmessage
API Name	ionoutboundmessage__c

This table shows the standard fields on the Outbound Message object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)

Custom objects and tabs

Field Label	Field Name	Data Type
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Message ID	Name	Text(80)
Owner	Owner	Lookup(User, Queue)

This table shows the custom fields and relationships on the Outbound Message object:

Field Label	Field Name	API Name	Data Type
Bod Xml	bodxml	bodxml__c	Long Text Area(32000)
Error Message	errormessage	errormessage__c	Long Text Area(2000)
Header Xml	headerxml	headerxml__c	Long Text Area(32000)
Message Priority	messagepriority	messagepriority__c	Number(5, 0)
Message Type	messagetype	messagetype__c	Text(255)
Related Logger Id	relatedloggerId	relatedloggerId__c	Text(20)
Related Logger URL	relatedloggerurl	relatedloggerurl__c	Formula (Text)
Related Record Ex- tId	relatedrecordextId	relatedrecordextId__c	Text(100)
Related Record SFId	relatedrecordsfid	relatedrecordsfid__c	Text(100)
Related Record URL	relatedrecordurl	relatedrecordurl__c	Formula (Text)
Was Processed	wasprocessed	wasprocessed__c	Number(18, 0)

Outbound Transaction object

This table shows the Custom Object Definition Details for the Outbound Transaction object:

Custom Object	Definition Detail
Singular Label	Outbound Transaction
Plural Label	Outbound Transactions
Object Name	ionoutboundtxn
API Name	ionoutboundtxn__c

This table shows the standard fields on the Outbound Transaction object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Name	Name	Auto Number
Owner	Owner	Lookup(User, Queue)

This table shows the custom fields and relationships on the Outbound Transaction object:

Field Label	Field Name	API Name	Data Type
Action Code	actioncode	actioncode__c	Picklist
Api Name	apiname	apiname__c	Text(100)
Error Message	errormessage	errormessage__c	Long Text Area(2000)
External Id	externalid	externalid__c	Text(255)
Retry Count	retrycount	retrycount__c	Number(5, 0)
Salesforce Id	salesforceid	salesforceid__c	Text(18)
Status	status	status__c	Picklist
Status Code	statuscode	statuscode__c	Number(18, 0)

Pay-from object

This table shows the Custom Object Definition Details for the Pay-from object:

Custom Object	Definition Detail
Singular Label	Pay-from
Plural Label	Pay-from Records
Object Name	payfrom
API Name	payfrom__c

This table shows the standard fields on the Pay-from object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)

Custom objects and tabs

Field Label	Field Name	Data Type
Owner	Owner	Lookup(User, Queue)
Pay-from Name	Name	Text(80)

This table shows the custom fields and relationships on the Pay-from object:

Field Label	Field Name	API Name	Data Type
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text(255)
Attention of Name	primaryaddressname	primaryaddressname__c	Text(255)
Bill-to	Billto	Billto__c	Lookup(Bill-to)
Can Send Bod	cansendbod	cansendbod__c	Checkbox
Email	email	email__c	Email
Fax	fax	fax__c	Phone
In Sync	InSync	InSync__c	Checkbox
Location ID	locationid	locationid__c	Text(255)
Logical ID	extlogicalid	extlogicalid__c	Text(255)
Message Source	Message_Source	Message_Source__c	Lookup(Message Source)
Other Phone	otherphone	otherphone__c	Phone
Payfrom ID	extRecordId	extRecordId__c	Text(255)
Payment Term	paymenttermid	paymenttermid__c	Lookup(Lookup)
Primary Phone	mainphone	mainphone__c	Phone
State/Province	primaryaddressstate	primaryaddressstate__c	Text(100)
Status	statuscode	statuscode__c	Picklist
Street	primaryaddressstreet	primaryaddressstreet__c	Long Text Area(256)
Unique ID	extid	extid__c	Text(255)
Variation Id	variationId	variationId__c	Number(18, 0)
Web Site	website	website__c	URL(255)
Zip/Postal Code	primaryaddresspostalcode	primaryaddresspostal code__c	Text(255)
Primary Contact	primarycontactid	primarycontactid__c	Lookup
zz_Address Type	addresstype	addresstype__c	Text(255)
zz_Pay-from Line 1	primaryaddressline1	primaryaddressline1__c	Text(255)
zz_Pay-from Line 2	primaryaddressline2	primaryaddressline2__c	Text(255)

Field Label	Field Name	API Name	Data Type
zz_Pay-from Line 3	primaryaddressline3	primaryaddressline3__c	Text(255)
zz_Pay-from Line 4	primaryaddressline4	primaryaddressline4__c	Text(255)
zz_Pay-from Line 5	primaryaddressline5	primaryaddressline5__c	Text(255)
zz_Pay-from Line 6	primaryaddressline6	primaryaddressline6__c	Text(255)
zz_Primary Address	primaryaddress	primaryaddress__c	Lookup(Address)
zz_Primary Contact	primarycontactid	primarycontactid__c	Lookup(Contact)

Person object

This table shows the Custom Object Definition Details for the Person object:

Custom Object	Definition Detail
Singular Label	Person
Plural Label	Persons
Object Name	Person
API Name	Person__c

This table shows the standard fields on the Person object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)
Person Name	Name	Text(80)

This table shows the custom fields and relationships on the Person object:

Field Label	Field Name	API Name	Data Type
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text(255)
Message Source	Message_Source	Message_Source__c	Lookup(Message Source)
Can Send Bod	cansendbod	cansendbod__c	Checkbox
City	city	city__c	Text(255)
Country	country	country__c	Text(255)

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Description	description	description__c	Text(255)
Email	email	email__c	Email
Ext Id	extId	extId__c	Text(255) (External ID) (Unique Case Insensitive)
Ext Location ID	extlogicalid	extlogicalid__c	Text(255)
Ext Record ID	extRecordId	extRecordId__c	Text(255)
Fax	fax	fax__c	Phone
In Sync	InSync	InSync__c	Checkbox
Location ID	locationid	locationid__c	Text(255)
Mobile Phone Office	mobile_phone_office	mobile_phone_office__c	Phone
Person ID	personID	personID__c	Text(255)
Phone	primaryphone	primaryphone__c	Phone
Related User	relateduser	relateduser__c	Lookup(User)
State or Province	stateorprovince	stateorprovince__c	Text(255)
Status Code	statuscode	statuscode__c	Picklist
Street	street	street__c	Text Area(255)
Title	title	title__c	Text(255)
Variation Id	variationid	variationid__c	Number(18, 0)
Zip/Postal Code	postalcode	postalcode__c	Text(255)

Price List object

This table shows the Custom Object Definition Details for the Price List object:

Custom Object	Definition Detail
Singular Label	Price List
Plural Label	Price List
Object Name	pricelist
API Name	pricelist__c

This table shows the standard fields on the Price List object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup (User)
Currency	CurrencyIsoCode	Picklist
Id	Name	Auto Number
Last Modified By	LastModifiedBy	Lookup (User)
Owner	Owner	Lookup (User, Queue)

This table shows the custom fields and relationships on the Price List object:

Field Label	Field Name	API Name	Data Type
Message Source	messagesource	messagesource__c	Lookup
Price Book ID	pricebookId	pricebookId__c	Text (18)

Quote Document object

This table shows the Custom Object Definition Details for the Quote Document object:

Singular Label	Quote Document
Plural Label	Quote Documents
Object Name	quoteDocument
API Name	quoteDocument__c

This table shows the standard fields on the Quote Document object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Quote PDF Name	Name	Text(80)

This table shows the custom fields and relationships on the Quote Document object:

Field Label	Field Name	API Name	Data Type
Deleted	IsDeleted	IsDeleted__c	Checkbox
Discount	Discount	Discount__c	Percent(5, 2)
Grand Total	grandTotal	grandTotal__c	Currency(16, 2)

Field Label	Field Name	API Name	Data Type
Quote	quoteld	quoteld__c	Master-Detail(Infor quote)
Won	won	won__c	Checkbox

Receivable object

This table shows the Custom Object Definition Details for the Receivable object:

Custom Object	Definition Detail
Singular Label	Receivable
Plural Label	Receivables
Object Name	Receivable
API Name	Receivable__c

This table shows the standard fields on the Receivable object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Document Number	Name	Text(80)
Last Modified By	LastModifiedBy	Lookup(User)

This table shows the custom fields and relationships on the Receivable object:

Field Label	Field Name	API Name	Data Type
Account	account	account__c	Master-Detail(Account)
Accounting Entity ID	extaccountingentityid	extaccounting entityid__c	Text(255)
Attention of Name	soldto_contactname	soldto_contactname__c	Formula (Text)
Base Amount	baseamount	baseamount__c	Currency(16, 2)
Bill-to	billto	billto__c	Lookup(Bill-to)
Bill-to Attention	billtoattention	billtoattention__c	Text(100)
Bill-to City	billtocity	billtocity__c	Text(100)
Bill-to Contact	billtocontact	billtocontact__c	Lookup(Contact)
Bill-to Country	billtocountry	billtocountry__c	Text(100)

Field Label	Field Name	API Name	Data Type
Bill-to State	billtostate	billtostate__c	Text(100)
Bill-to Street	billtostreet	billtostreet__c	Long Text Area(256)
Bill-to Zip	billtozip	billtozip__c	Text(100)
Can Send Bod	cansendbod	cansendbod__c	Checkbox
Department Name	departmentname	departmentname__c	Text(255)
Department Number	departmentnumber	departmentnumber__c	Text(255)
Description	description	description__c	Text(255)
Discount Allowed Amount	discountallowedamount	discountallowedamount__c	Currency(16, 2)
Discount Amount	discountamount	discountamount__c	Currency(16, 2)
Discount Taken Amount	discounttakenamount	discounttakenamount__c	Currency(16, 2)
Document Type	documenttype	documenttype__c	Text(255)
Exchange Rate	exchangerate	exchangerate__c	Number(16, 2)
Extended Amount	extendedamount	extendedamount__c	Currency(16, 2)
In Sync	InSync	InSync__c	Checkbox
Late Discount Indicator	latediscountflag	latediscountflag__c	Checkbox
Late Payment Amount	latepaymentamount	latepaymentamount__c	Currency(16, 2)
Late Payment Due Date	latepaymentduedate	latepaymentduedate__c	Date/Time
Location ID	locationid	locationid__c	Text(255)
Logical ID	extlogicalid	extlogicalid__c	Text(255)
Non Discount Amount	nondiscountamount	nondiscountamount__c	Currency(16, 2)
Pay-from	Payfrom	Payfrom__c	Lookup(Pay-from)
Pay-from Attention	payfromname1	payfromname1__c	Text(100)
Pay-from City	payfromcity	payfromcity__c	Text(100)
Pay-from Contact	payfromcontact	payfromcontact__c	Lookup(Contact)
Pay-from Country	payfromline1	payfromline1__c	Text(100)
Pay-from State	payfromline2	payfromline2__c	Text(100)

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Pay-from Street	payfromstreet	payfromstreet__c	Long Text Area(256)
Pay-from Zip	payfromzip	payfromzip__c	Text(100)
Payment Method	paymentmethod	paymentmethod__c	Text(255)
Payment Term	paymenttermid	paymenttermid__c	Lookup(Lookup)
Penalty Code	penaltycode	penaltycode__c	Text(255)
Penalty Description	penaltydescription	penaltydescription__c	Text(255)
Price List	pricebook	pricebook__c	Text(255)
Receipt Amount	receiptamount	receiptamount__c	Currency(16, 2)
Receivable Amount	receivableamount	receivableamount__c	Currency(16, 2)
Receivable ID	extRecordId	extRecordId__c	Text (255)
Received Amount	receivedamount	receivedamount__c	Currency(16, 2)
Sold-to City	soldtocity1	soldtocity1__c	Text(100)
Sold-to Country	soldtocountry1	soldtocountry1__c	Text(100)
Sold-to Name	soldtoname	soldtoname__c	Text(255)
Sold-to State	soldtostate	soldtostate__c	Text(100)
Sold-to Street	soldtostreet	soldtostreet__c	Long Text Area(256)
Sold-to Zip	soldtozip	soldtozip__c	Text(100)
Status	statuscode	statuscode__c	Picklist
Tax Amount	taxamount	taxamount__c	Currency(16, 2)
Tax Exempt Amount	taxexemptamount	taxexemptamount__c	Currency(16, 2)
Tax Exempt Code	taxexemptcode	taxexemptcode__c	Text(255)
Tax Exempt Description	taxexemptdescription	taxexemptdescription__c	Text(255)
Total Amount	totalamount	totalamount__c	Currency(16, 2)
Unique ID	extid	extid__c	Text(255) (External ID) (Unique Case Insensitive)
Variation Id	variationId	variationId__c	Number(18, 0)
Writeoff Amount	writeoffamount	writeoffamount__c	Currency(16, 2)
zz_Attention of Name	billtoname	billtoname__c	Formula (Text)

Field Label	Field Name	API Name	Data Type
zz_Attention of Name	payfromname	payfromname__c	Formula (Text)
zz_Bill-to Address	billtoAddress	billtoAddress__c	Lookup(zz_Transaction Address)
zz_Bill-to City	billtocity	billtocity__c	Formula (Text)
zz_Bill-to Country	billtocountry	billtocountry__c	Formula (Text)
zz_Bill-to Line 1	billtoline1	billtoline1__c	Formula (Text)
zz_Bill-to Line 2	billtoline2	billtoline2__c	Formula (Text)
zz_Bill-to Line 3	billtoline3	billtoline3__c	Formula (Text)
zz_Bill-to Line 4	billtoline4	billtoline4__c	Formula (Text)
zz_Bill-to Line 5	billtoline5	billtoline5__c	Formula (Text)
zz_Bill-to Line 6	billtoline6	billtoline6__c	Formula (Text)
zz_Bill-to State/Province	billtostateorprovince	billtostateorprovince__c	Formula (Text)
zz_Bill-to Zip/Postal Code	billtopostalcode	billtopostalcode__c	Formula (Text)
zz_Pay-from Address	payfromAddress	payfromAddress__c	Lookup(zz_Transaction Address)
zz_Pay-from City	payfromcity	payfromcity__c	Text(100)
zz_Pay-from Country	payfromcountry	payfromcountry__c	Lookup(Contact)
zz_Pay-from Line 1	payfromline1	payfromline1__c	Formula (Text)
zz_Pay-from Line 2	payfromline2	payfromline2__c	Formula (Text)
zz_Pay-from Line 3	payfromline3	payfromline3__c	Formula (Text)
zz_Pay-from Line 4	payfromline4	payfromline4__c	Formula (Text)
zz_Pay-from Line 5	payfromline5	payfromline5__c	Formula (Text)
zz_Pay-from Line 6	payfromline6	payfromline6__c	Formula (Text)
zz_Pay-from State/Province	payfromstateorprovince	payfromstateorprovince__c	Formula (Text)
zz_Pay-from Zip/Postal Code	payfrompostalcode	payfrompostalcode__c	Formula (Text)
zz_Sold-to Address	soldtoAddress	soldtoAddress__c	Lookup(zz_Transaction Address)
zz_Sold-to City	soldtocity	soldtocity__c	Formula (Text)
zz_Sold-to Country	soldtocountry	soldtocountry__c	Formula (Text)

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
zz_Sold-to Line 1	soldtoline1	soldtoline1__c	Formula (Text)
zz_Sold-to Line 2	soldtoline2	soldtoline2__c	Formula (Text)
zz_Sold-to Line 3	soldtoline3	soldtoline3__c	Formula (Text)
zz_Sold-to Line 4	soldtoline4	soldtoline4__c	Formula (Text)
zz_Sold-to Line 5	soldtoline5	soldtoline5__c	Formula (Text)
zz_Sold-to Line 6	soldtoline6	soldtoline6__c	Formula (Text)
zz_Sold-to State/Province	soldtostateorprovince	soldtostateor-province__c	Formula (Text)
zz_Sold-to Zip/Postal Code	soldtopostalcode	soldtopostalcode__c	Formula (Text)

Receivable Line object

This table shows the Custom Object Definition Details for the Receivable Line object:

Custom Object	Definition Detail
Singular Label	Receivable Line
Plural Label	Receivable Lines
Object Name	receivableline
API Name	receivableline__c

This table shows the standard fields on the Receivable Line object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Receivable Line Number	Name	Text(80)

This table shows the custom fields and relationships on the Receivable Line object:

Field Label	Field Name	API Name	Data Type
Amount	amount	amount__c	Currency(16, 2)
Base Amount	baseamount	baseamount__c	Currency(16, 2)
Description	description	description__c	Text(255)

Field Label	Field Name	API Name	Data Type
Extended Amount	extendedamount	extendedamount amount__c	Currency(16, 2)
Extended Base Amount	extendedbaseamount	extendedbaseamount amount__c	Currency(16, 2)
Product	product	product__c	Lookup(Product)
Receivable	receivable	receivable__c	Master-Detail(Receivable)
Receivable ID	extRecordId	extRecordId__c	Text (255)
Status	statuscode	statuscode__c	Picklist
Tax Amount	taxamount	taxamount__c	Currency(16, 2)
Tax Base Amount	taxbaseamount	taxbaseamount__c	Currency(16, 2)
Total Amount	totalamount	totalamount__c	Currency(16, 2)
Total Base Amount	totalbaseamount	totalbaseamount__c	Currency(16, 2)

Sales Order object

This table shows the Custom Object Definition Details for the Sales Order object:

Custom Object	Definition Detail
Singular Label	Sales Order
Plural Label	Sales Orders
Object Name	salesorder
API Name	salesorder__c

This table shows the standard fields on the Sales Order object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Sales Order Name	Name	Text(80)

This table shows the custom fields and relationships on the Sales Order object:

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text(255)
Back Order Flag	backorderflag	backorderflag__c	Checkbox
Billing Trigger Code	billingtriggercode	billingtriggercode__c	Text(255)
Bill-to	billto	billto__c	Lookup(Bill-to)
Bill-to City	billtocity1	billtocity1__c	Text(100)
Bill-to Country	billtocountry1	billtocountry1__c	Text(100)
Bill-to Name	billtoname	billtoname__c	Text(255)
Bill-to State	billtostate	billtostate__c	Text(100)
Bill-to Zip	billtozip	billtozip__c	Text(100)
Carrier Code	carriercode	carriercode__c	Text(255)
Carrier Name	carriername	carriername__c	Text(255)
Contract Number	contractnumber	contractnumber__c	Text(255)
Customer	Account	Account__c	Master-Detail(Account)
Customer Order Number	custordernumber	custordernumber__c	Text(255)
Department	department	department__c	Text(255)
Drop Ship Flag	dropshipflag	dropshipflag__c	Checkbox
Extended Pretax Amount	extendedpretaxamount	extendedpretaxamount__c	Currency(16, 2)
External Sales Rep Code	externalsalesrepcodes	externalsalesrepcodes__c	Text(255)
External Sales Rep Name	externalsalesrepname	externalsalesrepname__c	Text(255)
Grand Total	totalamount	totalamount__c	Currency(16, 2)
Inco Term	incotermid	incotermid__c	Lookup(Lookup)
Internal Sales Rep Code	internalsalesrepcodes	internalsalesrepcodes__c	Text(255)
Internal Sales Rep Name	internalsalesrepname	internalsalesrepname__c	Text(255)
Line Total	extendedamount	extendedamount__c	Currency(16, 2)
Location ID	locationid	locationid__c	Text(255)
Logical ID	extlogicalid	extlogicalid__c	Text(255)
Order Entry Date	OrderEntryDate	OrderEntryDate__c	Date/Time

Field Label	Field Name	API Name	Data Type
Order ID	extRecordId	extRecordId__c	Text(255)
Ownership Transfer	ownershiptransfer	ownershiptransfer__c	Text(50)
Partial Shipments Allowed	shipcompleteflag	shipcompleteflag__c	Checkbox
Pay-from	payfrom	payfrom__c	Lookup(Pay-from)
Pay-from Contact Name	payfromcontactname	payfromcontactname__c	Text(255)
Payment Method	paymentmethod	paymentmethod__c	Text(100)
Payment Term	paymenttermid	paymenttermid__c	Lookup(Lookup)
Price Book	priceBookId	priceBookId__c	Text(18)
Product Method	productmethod	productmethod__c	Text(255)
Promised Delivery Date	promiseddeliverydate	promiseddeliverydate__c	Date/Time
Promised Ship Date	promisedshipdate	promisedshipdate__c	Date/Time
Requested Delivery Date	requesteddeliverydate	requesteddeliverydate__c	Date/Time
Rush Flag	rushflag	rushflag__c	Checkbox
Self Billing Flag	selfbillingflag	selfbillingflag__c	Checkbox
Ship-to	shipto	shipto__c	Lookup(Ship-to)
Ship-to City	shiptocity	shiptocity__c	Text(100)
Ship-to Country	shiptocountry	shiptocountry__c	Text(100)
Ship-to Name	shiptoname	shiptoname__c	Text(255)
Ship-to State	shiptostate	shiptostate__c	Text(100)
Ship-to Street	shiptostreet	shiptostreet__c	Long Text Area(256)
Ship-to Zip	shiptozip	shiptozip__c	Text(100)
Sold-to City	soldtocity1	soldtocity1__c	Text(100)
Sold-to Country	soldtocountry1	soldtocountry1__c	Text(100)
Sold-to Name	soldtoname	soldtoname__c	Text(255)
Sold-to State	soldtostate	soldtostate__c	Text(100)
Sold-to Street	soldtostreet	soldtostreet__c	Long Text Area(256)
Sold-to Zip	soldtozip	soldtozip__c	Text(100)
Status	statuscode	statuscode__c	Picklist

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Total Discounted Amount	totaldiscountamount	totaldiscountamount__c	Currency(16, 2)
Unique ID	extid	extid__c	Text(100) (External ID) (Unique Case Insensitive)
Variation Id	variationid	variationid__c	Number(18, 0)
zz_Bill-to Address	billtoaddress	billtoaddress__c	Lookup(zz_Sales Order Address)
zz_Bill-to City	billtocity	billtocity__c	Formula (Text)
zz_Bill-to Country	billtocountry	billtocounrty__c	Formula (Text)
zz_Bill-to Line 1	billtoline1	billtoline1__c	Formula (Text)
zz_Bill-to Line 2	billtoline2	billtoline2__c	Formula (Text)
zz_Bill-to Line 3	billtoline3	billtoline3__c	Formula (Text)
zz_Bill-to Line 4	billtoline4	billtoline4__c	Formula (Text)
zz_Bill-to Line 5	billtoline5	billtoline5__c	Formula (Text)
zz_Bill-to Line 6	billtoline6	billtoline6__c	Formula (Text)
zz_Bill-to State/Province	billtostateorprovince	billtostateorprovince__c	Formula (Text)
zz_Bill-to Zip/Postal Code	billtopostalcode	billtopostalcode__c	Formula (Text)
zz_Ship-to Address	shiptoaddress	shiptoaddress__c	Lookup(zz_Sales Order Address)
zz_Ship-to City	shiptocity	shiptocity__c	Formula (Text)
zz_Ship-to Country	shiptocountry	shiptocountry__c	Formula (Text)
zz_Ship-to Line 1	shiptoline1	shiptoline1__c	Formula (Text)
zz_Ship-to Line 2	shiptoline2	shiptoline2__c	Formula (Text)
zz_Ship-to Line 3	shiptoline3	shiptoline3__c	Formula (Text)
zz_Ship-to Line 4	shiptoline4	shiptoline4__c	Formula (Text)
zz_Ship-to Line 5	shiptoline5	shiptoline5__c	Formula (Text)
zz_Ship-to Line 6	shiptoline6	shiptoline6__c	Formula (Text)
zz_Ship-to State/Province	shiptostateorprovince	shiptostateorprovince__c	Formula (Text)
zz_Ship-to Zip/Postal Code	shiptopostalcode	shiptopostalcode__c	Formula (Text)

Field Label	Field Name	API Name	Data Type
zz_Sold-to Address	soldtoaddress	soldtoaddress__c	Lookup(zz_Sales Order Address)
zz_Sold-to City	soldtocity	soldtocity__c	Formula (Text)
zz_Sold-to Country	soldtocountry	soldtocountry__c	Formula (Text)
zz_Sold-to Line 1	soldtoline1	soldtoline1__c	Formula (Text)
zz_Sold-to Line 2	soldtoline2	soldtoline2__c	Formula (Text)
zz_Sold-to Line 3	soldtoline3	soldtoline3__c	Formula (Text)
zz_Sold-to Line 4	soldtoline4	soldtoline4__c	Formula (Text)
zz_Sold-to Line 5	soldtoline5	soldtoline5__c	Formula (Text)
zz_Sold-to Line 6	soldtoline6	soldtoline6__c	Formula (Text)
zz_Sold-to State/Province	soldtostateorprovince	soldtostateorprovince__c	Formula (Text)
zz_Sold-to Zip/Postal Code	soldtopostalcode	soldtopostalcode__c	Formula (Text)

Sales Order Line object

This table shows the Custom Object Definition Details for the Sales Order Line object:

Custom Object	Definition Detail
Singular Label	Sales Order Line
Plural Label	Sales Order Line
Object Name	salesorderline
API Name	salesorderline__c

This table shows the standard fields on the Sales Order Line object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup (User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup (User)
Line Number	Name	Text (80)

This table shows the custom fields and relationships on the Sales Order Line object:

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Actual Ship Date	actualshipdate	actualshipdate__c	Date/Time
Address Contact	shipto_contactname	shipto_contactname__c	Text (100)
Back Order Flag	backorderflag	backorderflag__c	Checkbox
Carrier Code	carriercode	carriercode__c	Text (50)
Carrier Name	carriername	carriername__c	Text (100)
Classification Code	ItemClassification	ItemClassification__c	Lookup
Contact Name	contactname	contactname__c	Text (100)
Contract Number	contractnumber	contractnumber__c	Text (100)
Existing Product	productid	productid__c	Lookup
Extended Amount	extendedamount	extendedamount__c	Currency
Extended Unit Base Amount	baseamount	baseamount__c	Currency
Fixed Price Flag	fixedpriceflag	fixedpriceflag__c	Checkbox
Inco Term	incotermid	incotermid__c	Lookup
Ownership Transfer	ownershiptransfer	ownershiptransfer__c	Text (50)
Payment Term	paymenttermid	paymenttermid__c	Lookup
PO Line Number	polinenumbr	polinenumbr__c	Number
PO Number	ponumber	ponumber__c	Text (100)
Price Per Price Unit Quantity	priceperpriceunit	priceperpriceunit__c	Number
Price Per Price Uom	priceperpriceuom	priceperpriceuom__c	Text (10)
Price Per Unit	priceperunit	priceperunit__c	Currency
Promised Delivery Date	promiseddeliverydate	promiseddeliverydate__c	Date/Time
Promised Ship Date	promisedshipdate	promisedshipdate__c	Date/Time
Quantity	quantity	quantity__c	Number
Quote Line Number	quotelinenumbr	quotelinenumbr__c	Number
Quote Number	quotenumbr	quotenumbr__c	Text (100)
Request Date	requestdeliveryby	requestdeliveryby__c	Date/Time
Rush Flag	rushflag	rushflag__c	Checkbox
Sales Order	salesorderid	salesorderid__c	Master-Detail
Select Product	isproductoverridden	isproductoverridden__c	Picklist

Field Label	Field Name	API Name	Data Type
Self Billing Flag	selfbillingflag	selfbillingflag__c	Checkbox
Ship Complete Flag	shipcompleteflag	shipcompleteflag__c	Checkbox
Ship From Code	shipfromcode	shipfromcode__c	Text (100)
Shipped	quantityshipped	quantityshipped__c	Number
Ship-to	shiptoid	shiptoid__c	Lookup
Ship-to Line 1	shipto_line1	shipto_line1__c	Text (50)
Ship-to Line 2	shipto_line2	shipto_line2__c	Text (50)
Ship-to Line 3	shipto_line3	shipto_line3__c	Text (50)
Ship-to Line 4	shipto_line4	shipto_line4__c	Text (50)
Ship-to Line 5	shipto_line5	shipto_line5__c	Text (50)
Ship-to Line 6	shipto_line6	shipto_line6__c	Text (50)
Ship-to Location	shipto_location	shipto_location__c	Text (100)
Ship-to Location Type	Shipto_Locationtype	Shipto_Locationtype__c	Text (50)
Ship-to Name	shipto_name	shipto_name__c	Text (100)
Ship-to State/Province	shipto_stateorprovince	shipto_stateorprovince__c	Text (50)
Ship-to Zip/Postal Code	shipto_postalcode	shipto_postalcode__c	Text (20)
Ship UOM Code	shipuomcode	shipuomcode__c	Text (20)
Status	statuscode	statuscode__c	Picklist
Supplier	Supplier	Supplier__c	Text (64)
Supplier ID	Supplier_ID	Supplier_ID__c	Text (100)
Tax	tax	tax__c	Currency
Total Discount Amount	totaldiscountamount	totaldiscountamount__c	Currency
Unit	uomid	uomid__c	Lookup
Unit Base Price	unitbaseprice	unitbaseprice__c	Currency
Warehouse Code	warehousecode	warehousecode__c	Text (50)
Write-In Product Description	productdescription	productdescription__c	Long Text Area
Write-In Product Id	writeinproduct	writeinproduct__c	Text (100)

Ship-to object

This table shows the Custom Object Definition Details for the Ship-to object:

Custom Object	Definition Detail
Singular Label	Ship-to
Plural Label	Ship-to Records
Object Name	shipto
API Name	shipto__c

This table shows the standard fields on the Ship-to object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)
Ship-to Name	Name	Text(80)

This table shows the custom fields and relationships on the Ship-to object:

Field Label	Field Name	API Name	Data Type
Account	Account	Account__c	Lookup(Account)
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text(255)
Attention of Name	primaryaddressname	primaryaddressname__c	Text(255)
Can Send Bod	cansendbod	cansendbod__c	Checkbox
Carrier Name	carriername	carriername__c	Text(255)
Carrier Number	carriernumber	carriernumber__c	Text(255)
City	primaryaddresscity	primaryaddresscity__c	Text(255)
Country	primaryaddresscountry	primaryaddresscountry__c	Text(255)
Email	email	email__c	Email
Fax	fax	fax__c	Phone
In Sync	InSync	InSync__c	Checkbox
Location ID	locationid	locationid__c	Text(255)
Logical ID	extlogicalid	extlogicalid__c	Text(255)
Message Source	Message_Source	Message_Source__c	Lookup(Message Source)

Field Label	Field Name	API Name	Data Type
Other Phone	otherphone	otherphone__c	Phone
Primary Phone	mainphone	mainphone__c	Phone
Ship-to ID	extRecordId	extRecordId__c	Text(255)
SIC Code	SICCode	SICCode__c	Lookup(Lookup)
State/Province	primaryaddressstate	primaryaddressstate__c	Text(100)
Status	statuscode	statuscode__c	Picklist
Street	primaryaddressstreet	primaryaddressstreet__c	Long Text Area(256)
Unique ID	extid	extid__c	Text(255) (External ID) (Unique Case Insensitive)
Variation Id	variationId	variationId__c	Number(18, 0)
Web Site	website	website__c	URL(255)
Zip/Postal Code	primaryaddresspostalcode	primaryaddresspostalcode__c	Text(255)
zz_Address Type	addresstype	addresstype__c	Text(255)
zz_Primary Address	primaryaddress	primaryaddress__c	Lookup(Address)
zz_Primary Contact	primarycontactid	primarycontactid__c	Lookup(Contract)
zz_Ship-to Line 1	primaryaddressline1	primaryaddressline1__c	Text (255)
zz_Ship-to Line 2	primaryaddressline2	primaryaddressline2__c	Text (255)
zz_Ship-to Line 3	primaryaddressline3	primaryaddressline3__c	Text (255)
zz_Ship-to Line 4	primaryaddressline4	primaryaddressline4__c	Text (255)
zz_Ship-to Line 5	primaryaddressline5	primaryaddressline5__c	Text (255)
zz_Ship-to Line 6	primaryaddressline6	primaryaddressline6__c	Text (255)

Shipment object

This table shows the Custom Object Definition Details for the Shipment object:

Custom Object	Definition Detail
Singular Label	Shipment
Plural Label	Shipments
Object Name	shipment

Custom objects and tabs

Custom Object	Definition Detail
API Name	shipment__c

This table shows the standard fields on the Shipment object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)
Shipment Name	Name	Text(80)

This table shows the custom fields and relationships on the Shipment object:

Field Label	Field Name	API Name	Data Type
Account	Account	Account__c	Lookup
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text(255)
Actual Ship Date	actualshipdate	actualshipdate__c	Date
Carrier Code	carriercode	carriercode__c	Text(255)
Carrier Name	carriername	carriername__c	Text(255)
Contact	Contact	Contact__c	Lookup
Ext Location ID	extlocationid	extlocationid__c	Text(255)
Ext Source ID	extsourceid	extsourceid__c	Text(255)
Gross Weight	grossweight	grossweight__c	Number
Gross Weight UOM	grossweightuom	grossweightuom__c	Text (18)
Inco Term	incotermid	incotermid__c	Lookup
Loading Date	loadingdate	loadingdate__c	Date
Location Code	shipfrom_location	shipfrom_location__c	Text(255)
Location ID	locationid	locationid__c	Text (100)
Location Name	shipfrom_locationname	shipfrom_location-name__c	Text(255)
Ownership Transfer	ownershiptransfer	ownershiptransfer__c	Long Text Area
Partial Ship Flag	partialshipflag	partialshipflag__c	Checkbox
Reference Name	referencename	referencename__c	Text(255)
Return-to City	returnto_city	returnto_city__c	Text(255)

Field Label	Field Name	API Name	Data Type
Return-to Code	returnto_code	returnto_code__c	Text(255)
Return-to Contact Name	returnto_contactname	returnto_contactname__c	Text(255)
Return-to Country/Region	returnto_country	returnto_country__c	Text(255)
Return-to Name	returnto_name	returnto_name__c	Text(255)
Return-to State/Province	returnto_stateorprovince	returnto_stateorprovince__c	Text(255)
Return-to Street	returnto_street	returnto_street__c	Long Text Area(256)
Return-to Warehouse Code	returnto_warehousecode	returnto_warehousecode__c	Text(255)
Return-to Warehouse Name	returnto_warehousename	returnto_warehousename__c	Text(255)
Return-to Zip/Postal-code	returnto_postalcode	returnto_postalcode__c	Text(255)
Scheduled Delivery Date	scheduleddeliverydate	scheduleddeliverydate__c	Date
Scheduled Ship Date	scheduledshipdate	scheduledshipdate__c	Date
Shipment Id	extRecordId	extRecordId__c	Text(255)
Ship-to	extshipto	extshipto__c	Lookup
Ship-to Address	shiptoaddress	shiptoaddress__c	Lookup
Ship-to City	shipto_city	shipto_city__c	Formula
Ship-to Contact Name	shipto_contactname	shipto_contactname__c	Text(255)
Ship-to Country	shipto_country	shipto_country__c	Text(100)
Ship-to Location Name	shipto_locationname	shipto_locationname__c	Text(255)
Ship-to Name	shipto_name	shipto_name__c	Text(255)
Ship-to State	shipto_state	shipto_state__c	Text(100)
Ship-to Street	shiptostreet	shiptostreet__c	Long Text Area(256)
Ship-to Zip	shipto_zip	shipto_zip__c	Text(100)
Status	statuscode	statuscode__c	Picklist
Total Amount	totalamount	totalamount__c	Currency

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Transportation Method	transportationmethod	transportationmethod__c	Text(255)
Unique ID	extid	extid__c	Text(255)
Variation Id	variationid	variationid__c	Number
Warehouse Code	warehousecode	warehousecode__c	Text(255)
Warehouse Name	warehousename	warehousename__c	Text(255)
zz_Bill-to	Bill_to	Bill_to__c	Lookup
zz_Pay-from	Pay_from	Pay_from__c	Lookup
zz_Return-to Line 1	returnto_line1	returnto_line1__c	Text(255)
zz_Return-to Line 2	returnto_line2	returnto_line2__c	Text(255)
zz_Return-to Line 3	returnto_line3	returnto_line3__c	Text(255)
zz_Return-to Line 4	returnto_line4	returnto_line4__c	Text(255)
zz_Return-to Line 5	returnto_line5	returnto_line5__c	Text(255)
zz_Return-to Line 6	returnto_line6	returnto_line6__c	Text(255)
zz_Ship-to City	shipto_city	shipto_city__c	Formula (Text)
zz_Ship-to Country/Region	shipto_country	shipto_country__c	Formula (Text)
zz_Ship-to Line 1	shipto_line1	shipto_line1__c	Formula (Text)
zz_Ship-to Line 2	shipto_line2	shipto_line2__c	Formula (Text)
zz_Ship-to Line 3	shipto_line43	shipto_line3__c	Formula (Text)
zz_Ship-to Line 4	shipto_line4	shipto_line4__c	Formula (Text)
zz_Ship-to Line 5	shipto_line5	shipto_line5__c	Formula (Text)
zz_Ship-to Line 6	shipto_line6	shipto_line6__c	Formula (Text)
zz_Ship-to State/Province	shipto_stateorprovince	shipto_stateorprovince__c	Formula (Text)
zz_Ship-to Zip/Postalcode	shipto_postalcode	shipto_postalcode__c	Formula (Text)

Shipment Line object

This table shows the Custom Object Definition Details for the Shipment Line object:

Custom Object	Definition Detail
Singular Label	Shipment Line
Plural Label	Shipment Lines
Object Name	shipmentline
API Name	shipmentline__c

This table shows the standard fields on the Shipment Line object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Shipment Line Number	Name	Text(80)

This table shows the custom fields and relationships on the Shipment Line object:

Field Label	Field Name	API Name	Data Type
Auto Adjust	autoadjustflag	autoadjustflag__c	Checkbox
Country of Origin	countryoforigin	countryoforigin__c	Text(20)
Description	Description	Description__c	Long Text Area(1024)
Existing Product	productid	productid__c	Lookup(Product)
Ext Accounting Entity	extaccountingentityid	extaccountingentityid__c	Text(100)
Ext Location ID	extlocationid	extlocationid__c	Text(100)
Ext Source	extsourceid	extsourceid__c	Text(100)
Inspection Required	inspectionrequiredflag	inspectionrequiredflag__c	Checkbox
Load Weight	loadweight	loadweight__c	Number(14, 4)
Load Weight UOM	loadweightuom	loadweightuom__c	Text(20)
Location ID	locationid	locationid__c	Text(100)
Order Line Number	orderlinenumber	orderlinenumber__c	Number(18, 0)
Order Number	ordernumber	ordernumber__c	Text(100)
Order Quantity	orderquantity	orderquantity__c	Number(14, 4)
Product Description	productdescription	productdescription__c	Long Text Area(1024)
Select Product	isproductoverridden	isproductoverridden__c	Picklist

Custom objects and tabs

Field Label	Field Name	API Name	Data Type
Service Indicator	serviceflag	serviceflag__c	Checkbox
Shipment	shipmentid	shipmentid__c	Master-Detail(Shipment)
Shipment Line Number	shipmentlinenumber	shipmentlinenumber__c	Number(18, 0)
Shipped Quantity	shippedquantity	shippedquantity__c	Number(14, 4)
Shipping UOM	shippedquantityuom	shippedquantityuom	Text(20)
Status	statuscode	statuscode__c	Picklist
Uom	uomid	uomid__c	Lookup(UOM)
Write-In Product	writeinproduct	writeinproduct__c	Text(100)

Social Media object

This table shows the Custom Object Definition Details for the Social Media object:

Custom Object	Definition Detail
Singular Label	Social Media
Plural Label	Social Media
Object Name	socialmedia
API Name	socialmedia__c

This table shows the standard fields on the Social Media object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup (User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup (User)
Social Media Name	Name	Auto Number

This table shows the custom fields and relationships on the Social Media object:

Field Label	Field Name	API Name	Data Type
Contact	Contact	Contact__c	Master-Detail
Media Type	mediatype	mediatype__c	Picklist
URI	uri	uri__c	URL

Territory object

This table shows the Custom Object Definition Details for the Territory object:

Custom Object	Definition Detail
Singular Label	Territory
Plural Label	Territories
Object Name	Territory
API Name	Territory__c

This table shows the standard fields on the Territory object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)
Territory Name	Name	Text(80)

This table shows the custom fields and relationships on the Territory object:

Field Label	Field Name	API Name	Data Type
Accounting Entity ID	extaccountingentityid	extaccountingentityid__c	Text(255)
Can Send Bod	cansendbod	cansendbod__c	Checkbox
Description	description	description__c	Long Text Area(1024)
In Sync	InSync	InSync__c	Checkbox
Location ID	locationid	locationid__c	Text(255)
Logical ID	extlogicalid	extlogicalid__c	Text(255)
Message Source	Message_Source	Message_Source__c	Lookup(Message Source)
Status	statuscode	statuscode__c	Picklist
Territory Code	extRecordId	extRecordId__c	Text(255)
Unique Code	extid	extid__c	Text(255) (External ID) (Unique Case In-sensitive)
Variation Id	variationid	variationid__c	Number(18, 0)

Warehouse object

This table shows the Custom Object Definition Details for the Warehouse object:

Custom Object	Definition Detail
Singular Label	Warehouse
Plural Label	Warehouses
Object Name	Warehouse
API Name	Warehouse__c

This table shows the standard fields on the Warehouse object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User,Queue)
Warehouse Name	Name	Text(80)

This table shows the custom fields and relationships on the Warehouse object:

Field Label	Field Name	API Name	Data Type
Accounting Entity Id	extaccountingentityid	extaccountingentityid__c	Text(255)
ERP Location	ERPLocation	ERPLocation__c	Text(255)
Product	Product	Product__c	Lookup(Product)
Site ID	SiteID	SiteID__c	Text(255)
Site Name	SiteName	SiteName__c	Text(255)
UniqueID	UniqueID	UniqueID__c	Text(255)
WarehouseAreaID	warehouseareaid	warehouseid__c	Text(255)
Warehouse ID	WarehouseID	WarehouseID__c	Text(255)
Warehouse Name	WarehouseName	WarehouseName__c	Text(255)

UOM Object

This table shows the Custom Object Definition Details for the UOM object:

Custom Object	Definition Detail
Singular Label	UOM
Plural Label	UOM's
Object Name	uom
API Name	uom__c
Singular Label	UOM
Plural Label	UOM's
Object Name	uom
API Name	uom__c

This table shows the standard fields on the UOM object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Name	Name	Text(80)

This table shows the custom fields and relationships on the UOM object:

Field Label	Field Name	API Name	Data Type
Base UOM	baseuom	baseuom__c	Lookup(UOM)
Is Schedule Base Unit	isschedulebaseunit	isschedulebaseunit__c	Checkbox
Quantity	Quantity	Quantity__c	Number(13, 5)
Unit Group	unitgroup	unitgroup__c	Master-Detail(Unit Group)

Unit Group object

This table shows the Custom Object Definition Details for the Unit Group object:

Custom Object	Definition Detail
Singular Label	Unit Group
Plural Label	Unit Groups

Custom objects and tabs

Custom Object	Definition Detail
Object Name	unitgroup
API Name	unitgroup__c

This table shows the standard fields on the Unit Group object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)
Unit Group Name	Name	Text(80)

This table shows the custom fields and relationships on the Unit Group object:

Field Label	Field Name	API Name	Data Type
Base Unit Name	baseuomname	baseuomname__c	Text(100)
Description	description	description__c	Text Area(255)

zz_Account Bill-to Role object

This table shows the Custom Object Definition Details for the zz_Account Bill-to Role object:

Custom Object	Definition Detail
Singular Label	zz_Account Bill-to Role
Plural Label	zz_Account Bill-to Roles
Object Name	accountbilltorole
API Name	accountbilltorole__c

This table shows the standard fields on the zz_Account Bill-to Role object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
zz_Account Name	Name	Auto Number

This table shows the custom fields and relationships on the zz_Account Bill-to Role object:

Field Label	Field Name	API Name	Data Type
zz_Account	Account	Account__c	Master-Detail(Account)
zz_Bill-to	billto	billto__c	Master-Detail(Bill-to)

zz_Account Ship-to Role object

This table shows the Custom Object Definition Details for the zz_Account Ship-to Role object:

Custom Object	Definition Detail
Singular Label	zz_Account Ship-to Role
Plural Label	zz_Account Ship-to Roles
Object Name	accountshiptorole
API Name	accountshiptorole__c

This table shows the standard fields on the zz_Account Ship-to Role object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
zz_ID	Name	Auto Number

This table shows the custom fields and relationships on the zz_Account Ship-to Role object:

Field Label	Field Name	API Name	Data Type
zz_Account	account	account__c	Master-Detail(Account)
zz_Ship-to	shipto	shipto__c	Master-Detail(Ship-to)

zz_BillTo-PayFrom Role object

This table shows the Custom Object Definition Details for the zz_BillTo-PayFrom Role object:

Custom Object	Definition Detail
Singular Label	zz_BillTo-PayFrom Role
Plural Label	zz_BillTo-PayFrom Roles

Custom objects and tabs

Custom Object	Definition Detail
Object Name	billtopayfromrole
API Name	billtopayfromrole__c

This table shows the standard fields on the zz_BillTo-PayFrom Roles object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
zz_Name	Name	Auto Number

This table shows the custom fields and relationships on the zz_BillTo-PayFrom Roles object:

Field Label	Field Name	API Name	Data Type
zz_Bill To	billto	billto__c	Master-Detail(Bill-to)
Pay From	payfrom	payfrom__c	Master-Detail(Pay-from)

zz_Carrier Party object

This table shows the Custom Object Definition Details for the zz_Carrier Party object:

Custom Object	Definition Detail
Singular Label	zz_Carrier Party
Plural Label	zz_Carrier Party
Object Name	carrierparty
API Name	carrierparty__c

This table shows the standard fields on the zz_Carrier Party object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User, Queue)
zz_Carrier Name	Name	Text(80)

This table shows the custom fields and relationships on the zz_Carrier Party object:

Field Label	Field Name	API Name	Data Type
Carrier Number	carriernumber	carriernumber__c	Text(255) (External ID) (Unique Case Insensitive)

zz_Classification Code object

This table shows the Custom Object Definition Details for the zz_Classification Codes object:

Custom Object	Definition Detail
Singular Label	zz_Classification Code
Plural Label	zz_Classification Codes
Object Name	classificationcode
API Name	classificationcode__c

This table shows the standard fields on the Classification Codes object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User,Queue)
zz_Code	Name	Text(80)

This table shows the custom fields and relationships on the Classification Codes object:

Field Label	Field Name	API Name	Data Type
Classification Value	classificationvalue	classificationvalue__c	Text(255)
Description	classificationdescription	classificationdescription__c	Long Text Area(1024)
Product	productid	productid__c	Lookup(Product)

zz_Sales Order Address object

This table shows the Custom Object Definition Details for the zz_Sales Order Address object:

Custom objects and tabs

Custom Object	Definition Detail
Singular Label	zz_Sales Order Address
Plural Label	zz_Sales Order Addresses
Object Name	salesorderaddress
API Name	salesorderaddress__c

This table shows the standard fields on the zz_Sales Order Address object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup (User,Queue)
zz_Name	Name	Auto Number

This table shows the custom fields and relationships on the zz_Sales Order Address object:

Field Label	Field Name	API Name	Data Type
zz_Address Type	addresstype	addresstype__c	Picklist
zz_Attention of Name	attentionofname	attentionofname__c	Text(255)
zz_City	city	city__c	Text(255)
zz_Country	country	country__c	Text(255)
zz_Line 1	line1	line1__c	Text(255)
zz_Line 2	line2	line2__c	Text(255)
zz_Line 3	line3	line3__c	Text(255)
zz_Line 4	line4	line4__c	Text(255)
zz_Line 5	line5	line5__c	Text(255)
zz_Line 6	line6	line6__c	Text(255)
zz_State/Province	stateorprovince	stateorprovince__c	Text(255)
zz_Zip/Postal Code	postalcode	postalcode__c	Text(255)

zz_Serial Lot object

This table shows the Custom Object Definition Details for the zz_Serial Lot object:

Custom Object	Definition Detail
Singular Label	zz_Serial Lot
Plural Label	zz_Serial Lots
Object Name	serializedlot
API Name	serializedlot__c

This table shows the standard fields on the zz_Serial Lot object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Serial Lot Name	zz_Serial Lot Name	Auto Number

This table shows the custom fields and relationships on the zz_Serial Lot object:

Field Label	Field Name	API Name	Data Type
zz_Customer Return Line	customerreturnline	customerreturnline__c	Master-Detail(Customer Return Line)
zz_Lot Number	lotnumber	lotnumber__c	Text(100)
zz_Lot Selection	lotselection	lotselection__c	Text(100)
zz_Serial Number	serialnumber	serialnumber__c	Text(100)

zz_Ship-to Bill-to Role object

This table shows the Custom Object Definition Details for the zz_Ship-to Bill-to Role object:

Custom Object	Definition Detail
Singular Label	zz_Ship-to Bill-to Role
Plural Label	zz_Ship-to Bill-to Roles
Object Name	shiptobilltorole
API Name	shiptobilltorole__c

This table shows the standard fields on the zz_Ship-to Bill-to Role object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)

Field Label	Field Name	Data Type
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
zz_ID	Name	Auto Number

This table shows the custom fields and relationships on the zz_Ship-to Bill-to Role object:

Field Label	Field Name	API Name	Data Type
zz_Bill To	billto	billto__c	Master-Detail(Bill-to)
zz_Ship To	shipto	shipto__c	Master-Detail(Ship-to)

zz_Shipto-Carrier Party Role object

This table shows the Custom Object Definition Details for the zz_Shipto-Carrier Party Role object:

Custom Object	Definition Detail
Singular Label	zz_Shipto-Carrier Party Role
Plural Label	zz_Shipto-Carrier Party Roles
Object Name	shiptocarrierpartyrole
API Name	shiptocarrierpartyrole__c

This table shows the standard fields on the zz_Shipto-Carrier Party Role object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
zz_ID	Name	Auto Number

This table shows the custom fields and relationships on the zz_Shipto-Carrier Party Role object:

Field Label	Field Name	API Name	Data Type
Carrier Party	carrierparty	carrierparty__c	Master-Detail(zz_Carrier Party)
Shipto	shipto	shipto__c	Master-Detail(Ship-to)

zz_Transaction Address object

This table shows the Custom Object Definition Details for the zz_Transaction Address object:

Custom Object	Definition Detail
Singular Label	zz_Transaction Address
Plural Label	zz_Transaction Addresses
Object Name	transactionaddress
API Name	unitgroup__c

This table shows the standard fields on the zz_Transaction Address object:

Field Label	Field Name	Data Type
Created By	CreatedBy	Lookup(User)
Currency	CurrencyIsoCode	Picklist
Last Modified By	LastModifiedBy	Lookup(User)
Owner	Owner	Lookup(User,Queue)
zz_Transaction Address Name	Name	Auto Number

This table shows the custom fields and relationships on the zz_Transaction Address object:

Field Label	Field Name	API Name	Data Type
zz_Address Type	addresstype	addresstype__c	Picklist
zz_Attention of Name	attentionofname	attentionofname__c	Text(255)
zz_City	city	city__c	Text(255)
zz_Country	country	country__c	Text(255)
zz_Line 1	line1	line1__c	Text(255)
zz_Line 2	line2	line2__c	Text(255)
zz_Line 3	line3	line3__c	Text(255)
zz_Line 4	line4	line4__c	Text(255)
zz_Line 5	line5	line5__c	Text(255)
zz_Line 6	line6	line6__c	Text(255)
zz_State/Province	stateorprovince	stateorprovince__c	Text(255)
zz_Zip/Postal Code	postalcode	postalcode__c	Text(255)

Glossary

Account

An account is a customer or prospect that is synced with ERP. See "Enterprise Resource Planning (ERP)" on page 367. Salesforce, the **Account Type** field pick list is used to define the account as a customer or prospect.

back office system

A system that manages your financial, manufacturing, or distribution processes and acts as the System of Record (SOR) for your business.

BOD

See Business Object Document.

BOD field mapping

A collection of associations between Infor Back Office Connect and the back office system (ERP) fields to support data synchronization and integration between the two systems.

Business Object Document (BOD)

The common XML message structure provided by OAGIS is the BOD, which provides a message architecture based on the following reusable components:

- Nouns describe a common business object and are composed of components, which are basic building blocks shared across all nouns.
- Verbs describe the action to be applied to the noun. For example, the ProcessPurchaseOrder BOD is constructed from the PurchaseOrder Noun and the Process Verb. BOD messages are based on common nouns combined with a verb.

corporate currency

The currency of the organization, which is the currency in the location where the corporate headquarters are located. The Salesforce administrator sets the corporate currency. See "multi-currency" on page 368.

CRM

See Customer Relationship Management.

Customer Relationship Management (CRM)

A tool that is used to manage outward-facing front office sales and service activities.

Demilitarized Zone (DMZ)

A physical or logical sub-network that contains and exposes an organization's external services to a larger untrusted network, usually the Internet.

DMZ

See Demilitarized Zone.

domain data

A list of system-defined values for an attribute. Domain data can be displayed within a window, list, check box, or radio button. Typically, you can select only one value for an attribute. For example, domain data for address type can include home or office.

Enterprise Resource Planning (ERP)

Provides the functionality used to manage the demands of complex manufacturing, distribution, and service industries. It is an "On Premise" solution.

entity

A type of record in Infor Back Office Connect or Infor ERP. Orders, invoices, accounts, contacts, or items are all examples of an entity.

entity record

A specific occurrence of an entity. An ERP customer record, a product, or an Infor Back Office Connect account are examples of an entity record.

ERP

See Enterprise Resource Planning.

ESB

A software architecture model used for designing and implementing the interaction and communication between mutually interacting software applications.

exception

An abnormal condition or error that occurs during the integration between a source entity and a destination entity.

External ID

An External ID is a custom field with an External ID attribute that contains a unique record identifier from a system outside of Salesforce, such as an ERP. See Salesforce documentation.

filtered lookup

A filtered lookup is an administrator setting that restricts the valid values and lookup dialog results for a lookup, master-detail, and hierarchical relationship fields.

Infor ION Proxy Server

The Infor ION Proxy Server is deployed on Infor Cloud to integrate Infor applications with each other and with outside applications. The Infor ION Proxy Server consists of the ION Proxy Container and the ION Proxy XMPP Server. See Integrated Open Network Platform.

Integrated Open Network Platform (ION)

An ESB engine that is deployed on-premise. It allows modeling the integration of different Infor products to interact seamlessly. The runtime is mainly JMS-based solution although it provides different types of connectors allowing any Infor solution to get connected.

ION

See Integrated Open Network Platform.

map

A collection of associations between fields in one Infor Back Office Connect object with fields in another ERP object.

master data

Master data is used as the main data set which is also used by the transactional data. For example, an Account's master data list includes a list of all of the available customers.

multi-currency

When multi-currency is enabled in Salesforce, users and customers can view prices of products and services in multiple currencies. International organizations can use multiple currencies in opportunities, forecasts, reports, quotes, and other currency fields. In addition to the corporate currency, the system includes a list of active currencies and their conversion rates relative to the "corporate currency" on page 367. Every user also has a personal currency, which is used as the default currency their quotas, forecasts (depending on which forecasting version you use), opportunities, quotes, and reports. Users can also create opportunities and enter amounts using other active currencies.

object

A type of record in the ERP. For example, orders, invoices, accounts, customers, products, or items are objects.

object record

A specific occurrence of an object. An ERP customer record, a product, or an Infor Back Office Connect account are examples of an object record.

Return Material Authorization (RMA)

Customer returns a previously purchased product. A RMA is also known as a customer return.

RMA

See Return Material Authorization.

Salesforce.com (SFDC)

A web-architected, cloud-based internet application.

Salesforce.com Adapter

The Salesforce.com Adapter exposes a set of web-services to create the communication channel between the Salesforce application and ERP.

SFDC

See Salesforce.com.

SOR

See System of Record.

System of Record (SOR)

A system that maintains information.

transactional data

A set of data in a data-processing area in which the incidence of the data is essentially unpredictable, for example shipments and invoices.

variation ID

A variation ID is assigned to a BOD by Infor Back Office Connect to identify the number of times a record with a specific set of attributes has been published for the accounting entity and location. The variation ID is used to ensure that Infor Back Office Connect is reading in the latest version of the BOD. For example, a BOD with a variation ID of 5 is received and read in Infor Back Office Connect. Infor Back Office Connect then receives another BOD for the same record with a variation ID of 4. Upon receiving the BOD with the variance ID of 4, this BOD is assigned a processing status of 99 to indicate that the variation ID of 4 is older than the variation ID of 5.