Infor Back Office Connect Release Notes

Version 10.8

Important Notices

Trademark Acknowledgements

Publication Information

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Contents

Section A. General release notes information

This document provides general release notes for Infor Back Office Connect version 10.8 (v10.8). This information is intended to provide insight into the content included in the current released version of Infor Back Office Connect. This document does not replace the Infor Back Office Connect end user documentation that provides information and procedures for installing, upgrading, administering, and using system features and functionality in greater detail.

Introduction to Infor Back Office Connect v10.8

Infor Back Office Connect integrates Salesforce.com and Infor Enterprise Resource Planning (ERP) solutions. Built on the Force.com platform, Infor Back Office Connect leverages the power of the ION Suite and Salesforce.com to manage the flow of real-time data between CRM and ERP, providing a single solution to manage sales and manufacturing data within Salesforce.com.

Customer Relationship Management (CRM) and ERP are business systems essential for managing growing organizations. CRM is principally a tool for managing outward-facing front office sales and service activities. ERP is the core framework for managing inward-facing back office business operations including order management, service request management, production, distribution, and accounting.

For most growing enterprises, CRM and ERP systems are implemented as stand-alone systems that do not share data. Typically, CRM applications and the sales and customer support representatives who use them lose visibility of sales or service-related activities once an order has been placed and processed in the back office. Clearly, significant advantages are gained when CRM and ERP systems are integrated to automatically share and synchronize an organization’s business-centric systems.

The latest version of Infor Back Office Connect includes integration of dynamic and static master data. The dynamic master data includes accounts (customers), contacts, and products (items). The static master data includes all code definitions for account, contact and product master data. This release also includes integration of transaction data for the account (customer), quotes, sales orders, shipments, invoices, and receivables to provide a 360 degree view of the customer relationship to the sales agents.

Section B. 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/.
3. Specify the e-mail address and password for your Infor Xtreme user account.
4. Click **Login**. The 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**.

Section C. Deliverables

This section details the items delivered with Infor Back Office Connect v10.8.

Software

Infor Back Office Connect v10.8 includes software for the configuration and implementation of the Infor Back Office Connect v10.8 application and electronically formatted user documentation. These deliverables are available for download by Infor customers through the Salesforce appexchange (https://sites.secure.force.com/appexchange/home) in the following location: https://sites.secure.force.com/appexchange/listingDetail?listingId=a0N30000005uBsBEAU

Please contact your Infor account manager to gain access to the Infor Back Office Connect application.

Additional system requirements

Infor Back Office Connect requires Infor10 ION Connect3P Foundation v11.x or above.

Please contact your Infor account manager regarding ION Connect3P Foundation v11.x or above.

Documentation

Infor Back Office Connect v10.8 user documentation is delivered in Adobe Acrobat Portable Document Format (PDF).

The Infor Back Office Connect documentation set includes:

- *User Guide*
- *Administration Guide*
- *BOD Mapping and Descriptions (Inbound)*
- *BOD Mapping and Descriptions (Outbound)*

The *Administration Guide* is available for download from the Customization Guides section of the Infor Back Office Connect listing on the Salesforce appexchange: https://sites.secure.force.com/appexchange/listingDetail?listingId=a0N30000005uBsBEAU

The *User Guide* is available for download from the Infor Back Office Connect User Guide tab of the Infor Back Office Connect application.

Languages

The Infor Back Office Connect v10.8 user interface is translated to these languages:

- Chinese (Simplified)
- Dutch
- English
- French
- German
- Italian
- Japanese
- Portuguese (Brazil)
- Russian
- Spanish
- Swedish

Section D. New features in 10.8

This section contains information on the new features introduced in Infor Back Office Connect v10.8.

Address Line 1 no longer required

The Address Line 1 field is no longer a required field for Infor Back Office Connect, so that systems of record can publish BODs without addresses as a required field.

BOD processing priority

With the release of Infor Back Office Connect v10.8, Infor Back Office Connect system administrators are able to configure BODs to be processed based on their Noun priority so that dependent BODs are processed first.

Refer to “Configuring the scheduler settings” in *Chapter 4. Infor Back Office Connect configuration* of the *Infor Back Office Connect Administration Guide* for more information on the [BOD Noun] Priority scheduler setting.

Marking variation conflict BODs as successful

When an older version of a BOD is received in the application, the BOD will be processed and marked as successful so that it can be automatically removed with other successful BODs.

Additional many-to-many configuration options

In the Many to Many Configuration section of the Integration Setup page, these options have been added to enable you to configure additional many-to-many master data relationships:

- **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 defaults to a one-to-many master data relationship.

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.

See "Understanding account-to-contact relationships" in *Chapter 4. Infor Back Office Connect configuration* of the *Infor Back Office Connect Administration Guide*.

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.

Infor Back Office Connect 10.6.1 data must be migrated prior to actively using the data 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.

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" in *Chapter 4. Infor Back Office Connect configuration* of the *Infor Back Office Connect Administration Guide*.

Before migrating your data and configuring your many-to-many settings, see these version-specific guidelines:

- If you are upgrading from version 10.7.1 to 10.7.2, all many-to-many configuration settings must be disabled.
- 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

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 many-to-many records that are present 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.

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.

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.

Messages can be assigned these **Was Processed** 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
- "999" indicates that the message generated a Salesforce run time error

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 inbound 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.

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**.

Unit groups

A new configuration setting for unit groups is available in the Infor Back Office Connect settings of the Integration Setup page to determine the manner in which units of measure are processed 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 in Infor Back Office Connect v10.8.

There are two possible unit group 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. See "Configuring Infor Back Office Connect settings" in *Chapter 4. Infor Back Office Connect configuration* of the *Infor Back Office Connect Administration Guide*. If you enabled Standard unit group processing, additional configuration steps are also required.

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" in *Chapter 9. Upgrading* of the *Infor Back Office Connect Administration Guide*.
- 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.

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" in *Chapter 4. Infor Back Office Connect configuration* of the *Infor Back Office Connect Administration Guide*.
- 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:

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

Unit group: ITEM02	**Item**	**UOM**
	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:

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

Quote lines updates

If customers add custom fields to Quote Lines, when the values are manually updated on those custom fields in Infor Back Office Connect, the custom fields are added, updated, or deleted if the quote line number exists.

Section E. Upgrading to Infor Back Office Connect version 10.8

You can upgrade directly to Infor Back Office Connect version 10.8 from versions10.7.2.x or 10.7.1. You do not have to upgrade from version 10.6.x to 10.7.1 and then to 10.7.2.

For more information on upgrading Infor Back Office Connect to version 10.8, see “Chapter 9. Upgrading” of the *Infor Back Office Connect Administration Guide*.

Infor quote migration for a version 10.8 upgrade

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 10.7.x, you do not have to run the Quote Migration again for Infor Back Office Connect version 10.7.2. See “Chapter 11. Infor Quote migration” of the *Infor Back Office Connect Administration Guide*.

Section F. Post-upgrade instructions

This section contains information on post-upgrade tasks that you must complete after upgrading Infor Back Office Connect to version 10.8 on your Salesforce organization.

Caution: These post-upgrade steps are specific to Infor Back Office Connect version 10.8, and they must be completed after you have completed the upgrade process outlined in the *Infor Back Office Connect Administration Guide*.

See *Chapter 9. Upgrading* of the *Infor Back Office Connect Administration Guide* for detailed instructions on the upgrade process, including pre and post-upgrade checklists that provide sequences and recommendations related to the upgrade.

Removing Primary Contact fields from page layouts

With the release of Infor Back Office Connect version 10.7.4, the Primary Contact field is no longer support. This change also impacts Infor Back Office Connect version 10.8. Specifically:

- The Master Data BODs for Account, Ship-to, Bill-to, and Pay-from records no longer contain a Primary Contact field
- The One-to-Many Contact Roles listing now includes a Primary Flag displayed in the related lists of Contact Roles

Therefore, you must remove the Primary Contact field from the page layouts. The information in this section describes the steps required to remove the Primary Contact fields from page layouts.

Removing the Primary Contact field from the Account page layout

The steps to remove the Primary Contact field from the 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 ***Your name*** > **Setup**.

4 In the sidebar column, select **App Setup** > **Customize** > **Accounts** > **Page Layouts**.

5 In the Page Layout section, click **Edit** for the Infor Back Office Connect Account Layout.
6 In the Contact Roles related list, remove the **Account Contact Relationship**.
7 Click **OK**.

Removing the Primary Contact field from the Contact Roles page layout

The steps to remove the Primary Contact field from the Contact Roles 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. Select **Account Contact Relationship**.
6. In the Page Layouts section, click **Edit** for the Infor Back Office Connect AccountContactRole Layout.
7. In the Information section, click **Remove** (**-**) for the Is Primary check box.
8. Click **Save**.

Adding the Status field to the Shipment page layout

The Status field for the Shipment header must be added to the Shipment page layout.

The steps to add the Status field to your current 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. Select **Shipment**.
6. In the Page Layouts section, click **Edit** for the Infor Back Office Connect Shipment Layout.
7. In the Infor Back Office Connect Shipment Layout section, select the **Status** field and drag it to the General section.
8. Click **Save**.

Section G. Product improvements

The following is a list of product improvements included with the release of Infor Back Office Connect v10.8:

Number	Description
SFDC-378	Not allowing access to Integration Setup tabs until Seed Data is loaded
SFDC-1121	Storage reduction
SFDC-1572	Support Ship-to Party Masters to multiple Customer Party Masters
SFDC-1574	Support Bill-to Party Masters to multiple Ship-to Party Masters
SFDC-1650	Do not send confirm BOD for bad BOD Version
SFDC-1659	Notify user of migration of Master Data relationship from Many to Many to One to Many for records with multiple relationships
SFDC-1718	Add Shipment related list to Account Page Layout
SFDC-1813	Enable bulking for all triggers
SFDC-1835	Enable reprocessing of failed BODs
SFDC-1846	Removed time stamp from the “Effective From” and “Requested Delivery By” fields in Quote PDF generation
SFDC-1865	Do not fail BODs with an invalid Emails address
SFDC-1879	Address Line 1 is no longer required
SFDC-1895	Mark variation errors as successful
SFDC-1902	Enable multiple user area mappings in BODs
SFDC-1904	Add configuration options to enable Many to Many functionality for specific relationships
SFDC-1907	Do not fail Quote BODs missing a description
SFDC-1915	Enable Accounting Entity and Location ID when not populated by ERPs
SFDC-1921	Enable User Areas to support Lookups
SFDC-1922	Update BOD Version to 2.10.0
SFDC-1926	Deactivate a product when an Item Master is received with a Delete status

Number	Description
SFDC-1931	Changed Error message to note the element that is missing when a BOD is missing a required element
SFDC-1939	Allow outbound Customer Party Masters to work in single currency orgs
SFDC-1944	Update Quote lines instead of recreating
SFDC-1946	Populate the Shipment Return to Address
SFDC-1955	Remove Primary Contact from Contact Role page layouts
SFDC-1959	Ensure to process BODs even if Account is associated with a non- Infor Back Office Connect Contact
SFDC-1962	Ensure successful BODs are deleted during heavy load
SFDC-1980	Moved Shipment status to header from Shipment line
SFDC-1989	Add Standard Unit Groups option to save space
SFDC-1991	Allow ERP Quotes not to require Accounts