



Infor VISUAL CRM Web 10.0.0 Release Notes

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About this document

This document provides information about the enhancements and changes in VISUAL CRM Web.

Intended audience

This document is intended for a VISUAL CRM Web user and VISUAL CRM user.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

If we update this document after the product release, we will post the new version on the Infor Support Portal. To access documentation, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Prerequisites

The prerequisites to use VISUAL CRM Web:

- Infor VISUAL 10.0.0.
- Infor VISUAL CRM 10.0.0.6
- Internet Information Services 7.x or higher
- .NET Framework 4.8 or higher
- Enable ASP.NET 4.x for IIS
- The URL Rewrite extension for IIS

The CRM Web application is compatible with the latest versions of these browsers:

- Firefox
- Google Chrome
- Microsoft Edge
- Safari

Licensing

The new VISUAL CRM Web user interface (UI) can be activated using the existing CRM license key. Companies can transition the new UI with access to all the users at the same time, or in phases, for individual users.

Enhancements

This release of the VISUAL CRM Web solution focuses on replicating the existing CRM Contact Center features using the new web technology. The user interface, navigation, and settings are going to be modified and enhanced with each release.

The CRM Web apps can be used to perform a variety of tasks. These apps are available:

- **Accounts.** Use the Accounts feature to manage data for prospects, leads or customers. You can create and integrate selected accounts with VISUAL.
- **Contacts.** Use the Contacts feature to create and maintain contacts. CRM contacts are integrated with contacts in VISUAL.
- **Tasks.** Use the Tasks feature to create tasks related to these CRM record types: Account, Contact, Address, Task History, another Task or for general reminders.
- **Addresses.** Use the Addresses feature to include all account addresses in the CRM address table. CRM addresses are integrated with VISUAL for those associated accounts linked to a VISUAL customer.
- **History.** Use the History feature to create notes in relation to Accounts, Contacts, Addresses, Tasks, another History note or for general information. The History feature acts as a paper trail for tracking your correspondence, notes, and other information you want to access at a later date.

The apps connect directly to the VISUAL database. Transactions that you create in the apps are automatically defaulted in the VISUAL database.

Installing CRM Web 10.0.0

If you are installing CRM Web for the first time, see “Installing CRM Web” in the *Infor VISUAL CRM Web Contact Center Installation and Configuration Guide*.