



# Infor VISUAL CRM 10.0 Release Notes

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## New features

VISUAL CRM 10.0 has been enhanced to use new functionality of Infor VISUAL 10.0.0.

To use the enhancements that are described in this section, you must use VISUAL CRM 10.0 with Infor VISUAL 10.0.0. The enhancements are not available if you use VISUAL CRM 10.0 with a previous version of Infor VISUAL.

### Part status

In VISUAL 10.0.0, you can now set a part's status to Inactive. You can also specify that parts are used only in certain business functions, such as sales. These areas of CRM have been updated to consider the status of the part:

- **Quotes.** You cannot create a quote for an obsolete part, inactive part, or a part that is not allowed in sales transactions.
- **Converting a quote to an estimate or order.** If an inactive or obsolete part is specified on a CRM quote, you cannot convert the quote to an estimate or order. If a part that is not allowed in sales transactions is specified on a CRM quote, you cannot convert the quote to an estimate or order.
- **Service orders.** You cannot add an inactive or obsolete part as a material on a service order. You also cannot add a part that is not allowed in work orders as a material on a service order.
- **Part lookups.** In all areas of CRM, obsolete and inactive parts are not included in part lookups. In the Quotes module, parts that are not allowed in sales transactions are also not included in part lookups. In the Service Orders module, parts that are not allowed in work order transactions are also not included in part lookups.

### Sales rep status

In VISUAL 10.0.0, you can now set a sale rep's status to inactive. In CRM, inactive sales reps are not displayed in sales rep lookups. Inactive sales reps are still displayed in Sales Rep Maintenance.

## Locked accounting periods by business function

In VISUAL 10.0.0, you can now lock accounting periods by business function, such as Accounts Receivable. These areas of CRM have been updated to consider the status of business functions:

- **Service orders.** If an accounting period has been locked to prevent new manufacturing transactions, you cannot generate labor or inventory transactions for service orders.
- **Invoices.** If an account period has been locked to prevent new accounts receivable transactions, you cannot create new invoices.

## Single sign-on by user

VISUAL 10.0.0 now validates the use of single sign on by user. If a SID has not been set up for a CRM user, the regular CRM user credentials are used to access VISUAL applications.

## Compatibility

VISUAL CRM is compatible with these third-party products:

- Microsoft Office
- SQL Server
- Oracle
- MPC
- Microsoft Windows

The compatible versions of these products depend upon the version of Infor VISUAL that you use. See the software compatibility guide for your version of VISUAL

**Note:** The Master Product Configurator (MPC) database is single-byte. If you use Infor VISUAL 9.0.0 with CRM, double-byte characters used in VISUAL may not be displayed or stored properly in the MPC database. For best results, use characters in the Latin 1 character set for configured parts.

CRM can become unstable if certain freeware is running concurrently with CRM. For example, the FastStone screen capture application has been known to cause instability in CRM.

## Compatibility with other VISUAL products

VISUAL CRM 10.0 replaces VISUAL CRM 9.0 and is compatible only with Infor VISUAL 7.1.x and higher.

## Upgrading from a previous version

The changes made to your database during the upgrade depend upon the version of CRM that you currently use. If you are upgrading from CRM 7.0 or earlier, several changes will be made to the schema. As a result, you may need to recreate your advanced filters. Additionally, all grids are reset as part of the upgrade. Customized grids will need to be recreated after the upgrade. See the *Infor VISUAL CRM 10.0.0 Installation Guide*.

Ensure that your database is updated to a compatible version of VISUAL before you sign into CRM 10.0. For information about upgrading your database in VISUAL, see the database installation guide for your version of VISUAL and database engine.

Infor strongly recommends that you install the upgrade of your application in a test environment for evaluation prior to updating the production environment.

## Resolved issues

This table shows the issues that are resolved in version 10.0:

Defect #	Incident #	Description
639039	13693638	In date fields, you can now press <b>T</b> on the keyboard to enter today's date.
672313	13116296	In the App Builder, the year is now properly evaluated when sorting by date.
683957	13457858	During upgrade, an error is no longer generated when data is inserted in the V_RPT table.
687089	13550265 13774243	An error is no longer generated when upgrading CRM from version 20 to version 32.
681748	13349018	The <b>Bill?</b> check box can no longer be updated after a service order has been invoiced.
696640	13810194	A time out message is no longer received when processing invoices in a database where the V_INVOICE table contains many null receivable IDs.
696831	13810213	Part descriptions that exceed 50 characters are now displayed properly.
697616	13827895	The correct site ID is now used when creating a customer order from the My Accounts Orders grid.
721683	14465648	When invoicing a service order, users can now decide whether to use service order specifications or comments as invoice specifications. Specify your preference in the Defaults form.
722457	14463645	Deleting a contact from one account no longer deletes it from all accounts. This issue occurred when the contacts were created in Infor VISUAL.
725134	14544065	The correct site ID is now saved on opportunities. This issue occurred when opportunities were created for a site that is not the user's default site.
726473	14554581	In the App Builder, the year is now included in date fields.



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Defect #	Incident #	Description
736159	14758201	A warning message about missing Microsoft Office dependencies is no longer displayed if the <b>MS Office Not Installed</b> option is selected during installation.
737756	14766736	The default VAT code for an account is now automatically populated in the Contracts form.
738305	14821716	Ship to IDs are now properly displayed on order lines when the Shipto ID field is added to the grid.
738478	14781207	An issue with part prices by discount code being calculated incorrectly in multi-site databases has been resolved.
748235	15056248	Information about auto-numbering has been added to the user guide and online help.

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