



Infor VISUAL CRM 9.0 Release Notes

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Publication Information

Release: Infor VISUAL CRM 9.0

Publication date: May 31, 2017

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New features

VISUAL CRM 9.0 is now certified with Windows 10 and compatible with Microsoft Office 2016.

Note: An error message is displayed when initially connecting to Microsoft Outlook 2016 via the Exchange service from within VISUAL CRM. Click **OK** in the error message and Outlook 2016 and CRM function as expected. If an external circumstance results in CRM's disconnection with the Exchange service, CRM retains this connection as long as the application is running. If the message is displayed in an event other than its initial connection, click **OK** and processing continues.

Compatibility

Infor VISUAL CRM 9.0 is compatible with these third-party products:

- Microsoft Office 2007 (32-bit), 2010 (32-bit), 2013 (32-bit), 2016 (32-bit)
- SQL Server 2008 R2, SQL Server 2012, SQL Server 2014, and SQL Server 2016
- Oracle 11g and Oracle 12c
- MPC 6.2
- Windows 7, Windows 8, Windows 8.1, and Windows 10

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.*

Please be aware that CRM may 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 9.0 replaces VISUAL CRM 8.0 and is compatible only with Infor VISUAL 7.1.x and higher.

Note: *If you are upgrading to VISUAL 9.0.0 from VISUAL 7.1.2 and CRM 9.0 is already installed, you must update the CRM database triggers, procedures, functions, and views. After upgrading to VISUAL 9.0.0, and before using CRM 9.0, perform the update by running the CRM Database Upgrade application, or manually running the update scripts. See the Infor VISUAL CRM 9.0 Installation Guide for more details.*

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 9.0 Installation Guide.

If you use CRM in conjunction with Infor VISUAL, ensure that your database is updated to a compatible version of VISUAL before you sign into CRM 9.0. For information about upgrading your database in VISUAL, see the Infor VISUAL Application Installation Guide for your version of VISUAL.

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

Defects Addressed in CRM 9.0

This table lists defect fixes for issues resolved in CRM 9.0:

Defect #	Incident #	Description
557610	9891359	Fixed issue to display the correct history entries for a task.
559372	9913619	Fixed issue to include Country as an available field when customizing the Competitors grid.
561310	9968815	Fixed issue to include Order in the AppBuilder.
562135	9984550	Fixed issue to display the Enter Contact Address in the window title of the New Contact wizard.
562324	9982477	Fixed issue to display the quote owner as the user who created it.
564031	10020320	Fixed issue to display only the filtered records in the grid after saving changes.
564608	10030137	Fixed issue where subsequent to saving quote line items the child table displayed the details of the first quote in the parent grid.
566761	1005057	Fixed issue to keep the primary contact icon visible after selecting and saving the contact record as the primary contact.
567192	10076704	Fixed issue with the Text Import Utility to correctly link contacts to Account IDs, populate the contact record with account information, and import the contact into the associated VISUAL Manufacturing database.
567864	10098611	Fixed issue to correctly label information in the Address form.
568011	10005715	Fixed issue to properly pass terms rules from CRM to VISUAL when converting a CRM quote to VISUAL customer order.
568535	10110289	Fixed issue to provide a detailed timestamp for the create date of an estimate converted from a quote.
570395	10141512	Fixed issue within the new contact wizard and the creation of a new account for a contact, to now create the account's default entity and site records.
571231	10154370	Fixed issue to correctly import user defined fields when using the Text Import Utility to import them.
572403	10197279	Fixed issue to export contact information for non-primary contacts when synchronizing the contact to Outlook.
572822	10203180	Fixed issue to fully display notation content specified in VISUAL Manufacturing in the VISUAL CRM Estimates grid.
573077	10156414	Fixed issue to include images when displaying MPC reports with images.
579812	1884384	Fixed issue to prevent a duplicate link to a VISUAL contact when copying a contact.

Defect #	Incident #	Description
582012	10316438	Fixed issue where subsequent to saving quote line items the child table displayed the details of the first quote in the parent grid.
582143	9771075	Fixed issue to prevent a lock when simultaneously using CRM's Estimates grid with either VISUAL's Estimating window or VISUAL's Quotation reports.
582404	10262932	Fixed issue where creating a new account in the New Contact wizard from within the Competitor's grid, now correctly results in the creation of a competitor.
584294	10402336	Fixed issue to save text pasted using CTRL+V in a new Account History record.
587538	10322850	Fixed issue to prevent unintended updates to an account from a user with only Add security restrictions.
590259	10507499	Fixed issue where saving service order specifications resulted in an improper display of Chinese characters in the associated work order within the Manufacturing Window.