

Customer Relationship Management

➔ Benefit from integrated customer information in a single, central repository, providing a 360-degree view of each customer, including sales, marketing, field service, and help desk departmental functions.



Be enterprising.

In today's competitive business environment, many companies seek to tie their sales and marketing efforts to their back-office functions in order to streamline operations and improve profitability. Many companies are turning to Infor™ ERP VISUAL Customer Relationship Management (CRM) to help them accomplish that. Companies also want to personalize their CRM interface to mirror the nomenclature and business process that fits their business model. With Infor ERP VISUAL CRM, they can modify settings for tables and reports, and tailor user-defined fields for an optimized, industry-specific solution.

Leverage experience.

Infor ERP VISUAL CRM provides the tools you need to manage your prospects, customer accounts, contracts, and sales and marketing campaigns. This solution includes a Contact Center foundation module, as well as optional add-on modules to address your company's individual requirements: Sales, Help Desk, Field Service, and Marketing. With this solution, you can:

- Access your company, product, and pricing events with the fully customizable Today Electronic Bulletin Board.
- Send emails, letters, and documents easily with direct integration with Microsoft® Office.
- Use the mail merge feature to instantly send information to multiple contacts.
- Schedule and assign tasks and activities, and track details such as driving directions and meeting highlights.

Get business specific.

At the heart of Infor ERP VISUAL CRM is an unrivaled contact management capability that helps you retain your existing customers and acquire new accounts by tracking everything there is to know about your prospects and customers. You can schedule activities, write letters and emails, and keep detailed notes about conversations with contacts. You can easily view histories, tasks, and other sales data for every contact, at every account. You can also access important back-office data such as accounts receivable, current part inventory, return material authorization (RMA) status, estimates, sales orders, credit status, shipments, and more. With this solution, you can:

- Improve the effectiveness of your sales team.
- Develop price quotes and accurately configure products using the Infor ERP VISUAL Configurator.
- Convert quotes to estimates and orders automatically without redundant data entry.
- Develop sales plans to chart the next step in a sales cycle.
- Create estimates using a direct interface to Infor ERP VISUAL's Estimating Window.
- Assign quotas by sales representative, territory, business unit, branch, or division.
- Develop and analyze revenue pipelines.

Infor ERP VISUAL CRM allows your customer support help desk staff to track calls and creates a comprehensive knowledge base of customer issues and resolutions. Log calls according to part ID, serial number, product categories, and service contracts. Track the history of each resolution attempt, complete with a time, date, and user ID stamp.

Customer satisfaction is an ultimate goal of every company, and Infor ERP VISUAL CRM facilitates exceptional service within its Field Service module. You can manage service orders, warranty and maintenance contracts, dispatch scheduling, RMAs, inventory, and billing. View maintenance schedules and assign appropriate technicians to service orders. Improve customer satisfaction by managing inventory and labor to avoid delays.

With the success of your sales team depending on your marketing efforts, Infor ERP VISUAL CRM's marketing module will help you create, launch, and manage the effectiveness of your marketing campaigns and events, which can help you significantly increase your overall ROI.

See results now.

As a fully integrated capability with Infor ERP VISUAL, the CRM module delivers consistent, real-time information across the organization that lets you easily manage your prospects, customers, customer service logs, and sales and marketing campaigns locally. This solution also enables you to stay connected remotely while out of the office. Infor ERP VISUAL CRM provides all the tools you need to significantly improve your enterprise communications and dramatically increase customer satisfaction.

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Contact your local Infor office regarding availability of products in your region.

