



focus on essentials

Infor VISUAL CRM

discrete manufacturing

Integrated CRM Functionality for Improved Productivity



In today's competitive business environment, many companies are seeking to tie their sales and marketing efforts to their back office functions in order to streamline operations and improve productivity. And many of them are turning to Infor VISUAL CRM (Customer Relationship Management) to help them do it. Infor VISUAL CRM provides all the tools you need to significantly improve your enterprise communication and dramatically increase customer satisfaction. This solution delivers complete integration with Infor VISUAL™, providing accessible, real-time information that lets you easily manage your prospects, customers, customer service, sales and marketing campaigns.

Developed with personalization in mind, Infor VISUAL CRM's scalable, flexible design allows you to modify settings for tables, reports, user-defined fields and security. The core of Infor VISUAL CRM is the Contact Center foundation module, which provides complete contact management functionality. There are also five optional add-on modules available—Sales, Help Desk, Field Service, Marketing and Remote Sync. This unique flexibility and in-depth functionality make Infor VISUAL CRM the customer relationship management tool of choice for companies around the world.

Unrivaled Contact Management Functionality

Dramatically Improved Sales Efforts

Stellar Customer Service

Effective, Cost-Effective Marketing

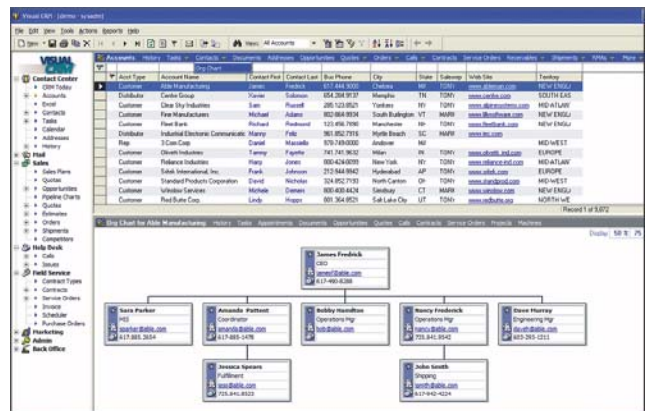
Mobile Access to Enterprise Data

Contact Center

Infor VISUAL CRM's Contact Center module provides unrivaled contact management functionality from a single database. It helps you keep your current customers while obtaining new ones by tracking "everything there is to know" about prospects and customers. You can schedule activities, write letters and e-mails and keep detailed notes about conversations with contacts. This impressive tool also lets you easily view histories, tasks and other sales data for each contact at every account. Important back office data such as accounts receivable, current part inventory, return material authorization (RMA) status, estimates, sales orders, credit status, shipments and more are all easily accessible.

Features & Benefits

- Access your company, product and pricing events with the CRM Today Electronic Bulletin Board
- Send e-mails, letters and documents easily with direct Microsoft Office integration
- All e-mails can be saved directly to Infor VISUAL CRM for enterprise-wide visibility
- Schedule and assign tasks and activities, and track details such as driving directions and meeting highlights
- Convert prospects to customers automatically without redundant data entry
- Track calls, meetings and "To Do" tasks with Calendar Management
- View important data using standard reports or develop on-the-fly custom reports





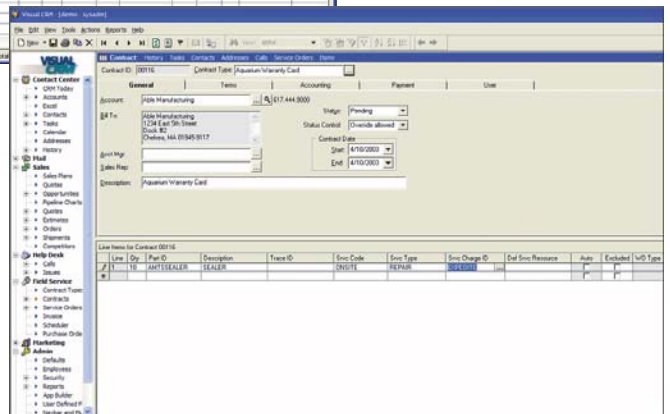
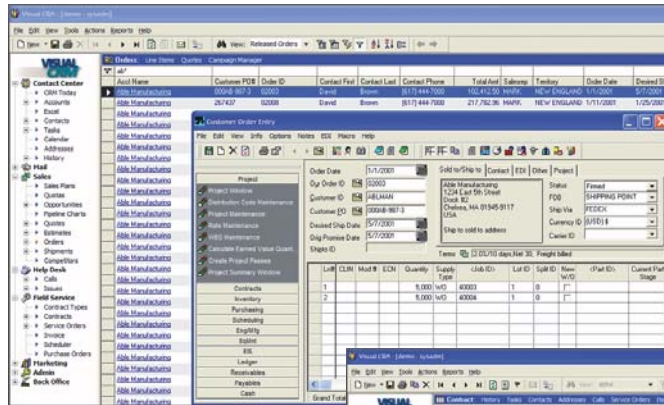
Infor VISUAL CRM Benefits

- Integrates front office applications with Infor VISUAL Enterprise, ensuring accurate data throughout the company
- Improves communication with customers and suppliers
- Helps businesses more easily manage sales and post sales processes
- Eliminates data entry redundancies with a single source for all customer information
- Ensures that manufacturers stay competitive with technology that improves work flow and integrates business contact information
- Increases customer satisfaction

Sales

Infor VISUAL CRM will help you dramatically improve the effectiveness of your sales team, allowing them to access complete views of customer accounts and opportunities.

Remote and internal users can easily develop price quotes, accurately configure products using the optional Infor VISUAL Product Configurator, and quickly view key account information—with the click of a mouse.

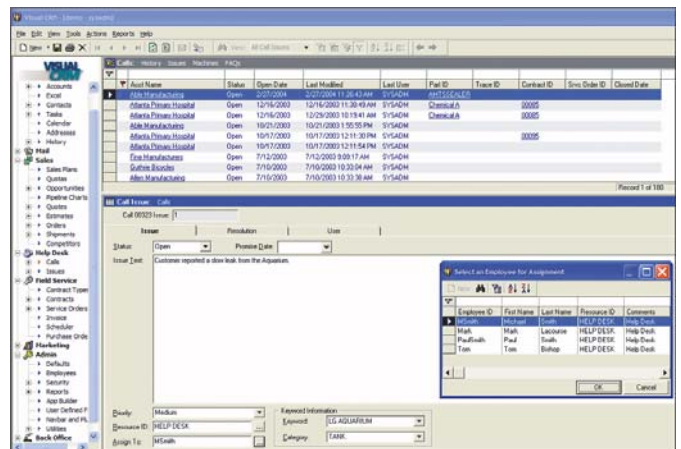


Features & Benefits

- Assign quotas by sales rep, territory, business unit, branch or division
- Track opportunities assigned to all sales reps and all potential revenue
- View complete call history
- Automatically create tasks from a sales plan
- Build product configurations with a direct link to the Infor VISUAL Product Configurator
- Create and e-mail professional proposals
- Easily convert quotes to orders, saving redundant data entry
- Enter orders and verify order status
- Track lead source to measure demand generation performance
- Manage complete competitive intelligence

Help Desk

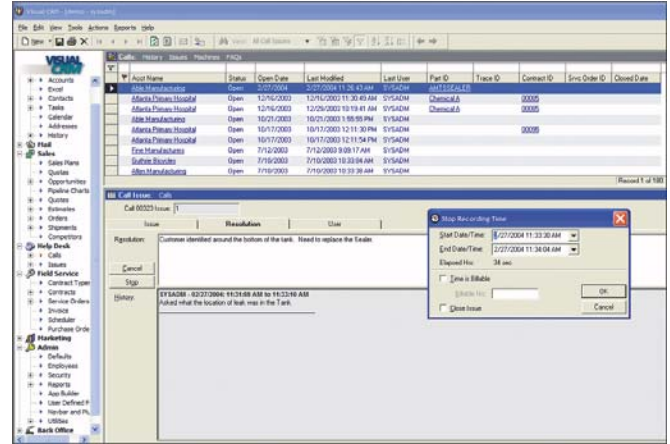
Customer satisfaction is an ultimate goal of every company and Infor VISUAL CRM facilitates exceptional customer service within its Help Desk module, allowing you to respond quickly to any customer request. This powerful module lets you track customer calls and create a comprehensive knowledge base of customer issues and resolutions, as well as the history of resolution attempts, complete with time, date and user ID stamps. Help Desk's automated record keeping and useful search tools let your customer service representatives (CSRs) easily manage infor-



mation. They can log calls based on part ID, product serial number or category and service contracts, which reduces help desk response time and improves customer satisfaction. And being able to access detailed customer histories allows your CSRs to deliver prompt, accurate service resulting in improved customer retention and increased sales.

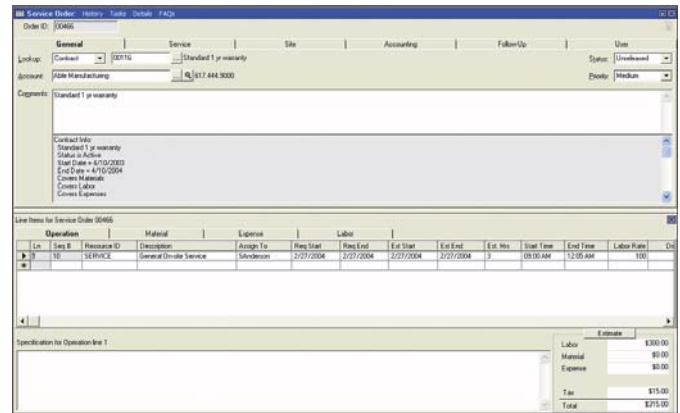
Features & Benefits

- Capture primary call information
- Assign calls to appropriate CSRs for resolution
- Develop multiple views of call issues and resolutions and filter them by priority level, CSR, product, etc.
- Share notes with other users
- Track complete call history
- Prioritize call issues
- Trace issues by part ID, serial number or service contract
- Create knowledge base of issues and resolutions for faster problem solving



Field Service

If you install, support or maintain your products in the field, the Field Service module can help you automate these complex transactions. Now you can manage service orders, warranty and maintenance contracts, dispatch scheduling, RMAs, inventory and billing with ease. And with access to contract and service history, you can improve customer satisfaction by managing inventory and labor to avoid delays.

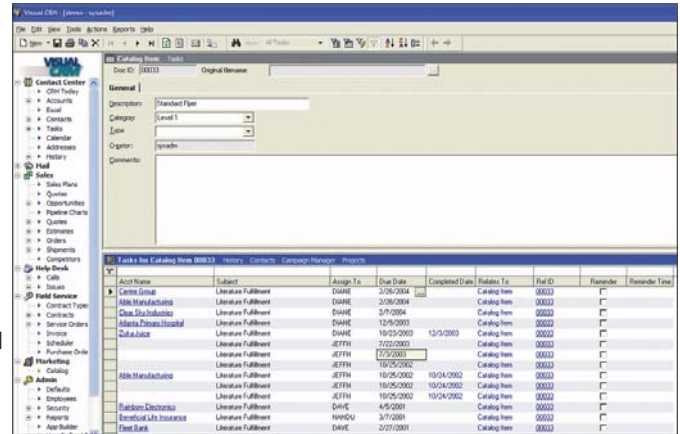


Features & Benefits

- Improve service call response time
- Increase service revenue
- Control and track costs
- Improve the productivity of field service technicians
- Enter service orders and search customer records quickly
- Track parts, labor and expenses
- Schedule automatic follow-up customer service phone calls
- Auto-generate invoicing and assign charges to the General Ledger

Marketing

Very often, the success of your sales team depends on your organization's marketing efforts. Infor VISUAL CRM's Marketing module helps you keep your team aware of current campaigns, events, target strategies and literature updates. Now you can easily create catalogs of marketing literature and automate the fulfillment of documents, track the effectiveness of your campaigns and events, and effectively manage your marketing strategies—which can help you significantly increase your overall ROI.

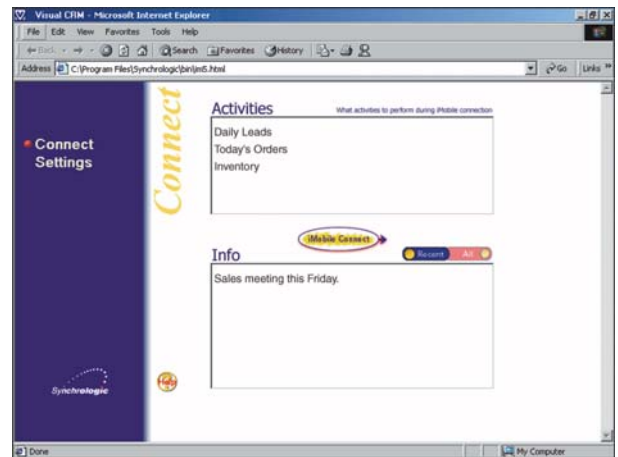


Features & Benefits

- Define, manage and measure campaign / event effectiveness
- Track attendance levels of every event and the event's contribution to sales
- Track budgets and costs
- Maintain literature catalogs and send them to prospects electronically

Remote Sync

Infor VISUAL's customer relationship management solution allows you to mobilize your customer sales and service teams. Its Remote Synchronization tool allows them to access the most current information, from anywhere. After completing offline business transactions, your remote users can synchronize the new data and easily download the latest leads, account history and product data. By synchronizing data from the Sales module, Contact Center and e-mail, Remote Sync helps improve productivity and eliminate manual errors. And because Remote Sync updates only the altered or added fields—not the entire database—when changes or additions are made, your team can transfer data quickly and efficiently.



Features & Benefits

- Keep sales and service teams up-to-date with current information
- Synchronize data and easily download leads, account history and product info
- Eliminate data entry errors
- Make fast, efficient data transfers

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