



focus on essentials

Delivering a Total Customer Experience



Infor **VISUAL™**'s **Customer Management** includes the following:

Account and Contact Management

Sales Force Automation

Marketing Campaigns

Product Configuration

eBusiness

Help Desk

Field Service and Warranty Tracking

Remote Synchronization and Security

Proposals and Pipelines

Return Material Authorizations

Managing customer relationships has become ever more complex and important. Customers expect increased levels of service and, while price and quality are contributing factors, today's companies are winning contracts by differentiating on the "total customer experience." Infor VISUAL™ helps you provide your customers with the finished product they want—when they want it, where they want it and packaged the way they want—all at the right price. Infor VISUAL provides you with a 360° view of all aspects of your customer relationships, allowing you to track their preferences and address and communicate their unique needs.

While other customer relationship management (CRM) systems may interface with enterprise applications, Infor VISUAL provides complete, seamless integration with all your enterprise functions, connecting you with vital, real-time data about inventory, sales, customer histories and finances. With this powerful system, you get the actionable information you need to communicate effectively with your employees and customers; to dramatically improve the effectiveness of your sales team; to respond quickly to even the most demanding customer request; to organize, forecast, track and report your operations with a system that provides more visibility than ever before and helps you more easily attain your business goals.

Account and Contact Management

For example, Infor VISUAL offers unrivaled account and contact functionality from a single database through its Contact Center, which helps you keep current customers while obtaining new ones by tracking "everything there is to know" about them. You can schedule activities, write and track letters and e-mails, and keep detailed notes about conversations with contacts. This impressive tool lets you easily view histories, tasks and 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 immediately accessible.



Sales Force Automation

Infor VISUAL's Customer Management tools will help you dramatically improve the effectiveness of your sales team, allowing them to access complete views of opportunities, pipelines, proposals, competitive data and more. Remote and internal users can easily develop price quotes, accurately configure products and quickly view key account information—all with the click of a mouse. With this level of access into real-time data, your sales force will more readily identify potential sales opportunities and make more profitable decisions.



"We wanted to collaborate between departments. One of the biggest benefits we've seen is improved reporting. We can now gather information about customers' jobs, calls, warranties, and mailings to customers and prospects. Customer service has always been a top priority for us. Now our service representatives can better assist our customers. They know what calls are coming in, and they are aware of any prior communications and issues ahead of time. They can see leads, quotes, and open orders and easily drill down to line items. It's been amazing."

Heidi Fausett
Information Technology
Manager, LiteTouch

Marketing Campaigns

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

Product Configurator

For companies that manufacture complex, highly configurable products and need a sophisticated development tool with a host of flexible options, Infor VISUAL's Product Configurator module is the answer. It enables your sales force to correctly customize and configure your product, then quickly and easily create quotes and customer orders in Infor VISUAL. The Product Configurator is a sophisticated configurator and compatibility engine that handles all requests for changes to the base specification through an easy-to-use Windows® interface. The end result is a product specification that has been fully checked for component compatibility and completeness.

eBusiness

This fast-implementing online solution is designed to help companies improve productivity and satisfy customer demand through the use of Internet technology. Supporting both B2B and B2C transactions, this powerful tool enables companies to easily implement self-service capabilities over the Web. Infor VISUAL's eBusiness module helps you extend your market reach, display real-time information and increase customer satisfaction.

Help Desk

The system's powerful feature 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 information. 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.

Field Service and Warranty Tracking

Infor VISUAL continues the theme of exceptional customer service with its Field Service module, allowing you to respond quickly to virtually any customer request. With its seamless integration, you can manage service orders, warranty and maintenance contracts, RMAs, inventory and billing with ease.

Remote Sync

Infor VISUAL also allows you to mobilize your customer sales and service teams through its Remote Synchronization tool, which provides them access to 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 are made, your team can transfer data quickly and efficiently.

www.infor.com

500 Lafayette Road
Hampton, NH 03842

Tel: 603.926.9696
Fax: 603.929.3975
Corp. Fax: 603.926.9698

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