

Infor10 Distribution Express (FACTS) Relationship Management (RM)

Target Your Customer Communications More Effectively

Relationship Management (RM) provides a comprehensive, integrated view to manage and track everything about your prospects and customers. RM delivers consistent, real-time information and provides all the tools you need to significantly improve your business communications and dramatically increase customer satisfaction.

At the most basic level, RM allows you to easily track of who you contacted, why and when. But there are more ways to leverage RM that can help you integrate and smooth your marketing and sales processes, track of sales and leads, manage customer pipelines and improve credit / collections processes.

Outlook Integration

The integration to Outlook® provides an improved level of convenient communications eliminating the need to duplicate information such as contact lists, calendar entries and more.

- **Contacts** – Manage your Outlook contacts from within RM. Create industry standard vCard files from any contact screen.
- **Calendar** – Update your Outlook® calendar with RM To Dos. See the results in real time with industry standard iCal files.
- **Email** – Automatically create a copy of outbound emails on your Outlook® sent items folder.
- **User Preferences** – Select a user level the option to email either the vCard or iCal files if your Outlook® is not local, turn on or off sent email.

Relationship Management identifies
who you need to contact, why and
when so you can focus all your
communications more effectively.

Solve Credit and Collections Challenges

For most distributors without RM, credit and collections is a tedious, time-consuming manual process that erodes both your margins and your customer relations. With RM, you can integrate disparate credit and collection functions into a streamlined process that will improve your cash flow and customer relationships – even for your problem customers.

- Bring consistency and efficiency to your cash flow management by tracking outstanding invoices by customer aging, branch, salesperson and other filters
- Transaction history captures all interactions with contacts in the collection process
- Use filters to identify and target problem receivables to manage by exception
- Manage customer or vendor problems any time using email and scheduling tools
- Notes Companion provides an instant view of all communications as you navigate
- Print or email invoices and statements on the fly for efficient communications
- Access customer data easily to better manage status, issues, call logs and invoices

Improved Notes View and Management

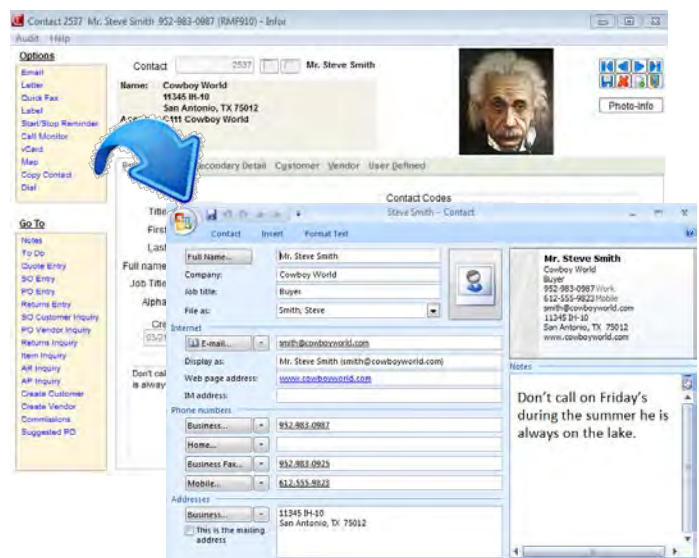
- **Launch** – A user defined key will launch the notes viewer from any (FACTS) screen
- **Auto Sync** – Based on user preference the viewer will synchronize to the active customer, vendor or contact in other sessions
- **Text Search** – Search for keywords with whole word and match case options
- **Filters** – Select which notes and to-dos to include or exclude by type and owner, refine the content
- **Security** – All filter selections are managed through security profiles
- **Notes Query** – Same functionality as the viewer with the standard contact filter integrated
- **Note Deletion** – With proper security, notes can be selectively deleted or mass deleted by date

Email

- **Integrated HTML Editor** – Create rich HTML content for your email and notes. With the editor you can create components like logos, signatures and email bodies. A multi-select option makes it easy to assemble professional and flexible templates
- **HTML Notes** – HTML content is stored in notes and can be viewed everywhere you see notes including the new notes viewer and query.
- **New Template Options** – Include delivery and read receipts. Add CC & BCC addresses for default.
- **Run Time Replacements** – Additional user and salesperson codes allow greater flexibility

Additional Enhancements in 7.7

- Multiple invoice selections for credit/collections
- Manage RM contacts from the customer and vendor F/M programs with the newly added link.
- Contact F/M supports contact images, additional phone number and other enhancements
- Quick Contact entry program is context sensitive. Available information is automatically imported to make it quicker and easier to add contacts
- Email addresses and fax numbers automatically synchronize between contact F/M and system
- Many new user preferences added to further enhance the usability of RM



Screenshot vCard from Contact F/M

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