Infor VISUAL CRM

Manage complex customer relationships.

Manufacturers with complex production strategies face equally complex customer relationship management (CRM) requirements. When your production is driven directly by orders or other specific customer requirements, effective CRM has to be a priority.

Employees interacting directly with your customers need fast access to accurate information about what an individual customer wants, when and where they want it, and the status of your company's fulfillment of the order. The picture of each customer must also include relevant back-office details.

Make CRM a strategic resource.

With Infor™ VISUAL CRM, you'll manage every customer touch point from a central location. You get contact-center capabilities specifically designed for manufacturing environments and several optional modules to meet specific requirements for employees in sales, marketing, help desk operations, field service, and administration.

Infor VISUAL CRM is tightly integrated into the core enterprise resource planning capabilities of VISUAL, so you can be confident your customer relationship management will be a strategic corporate resource.

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Integrate every customer touch point.

Infor VISUAL CRM automates CRM processes across your enterprise to make your marketing, sales, manufacturing, and support employees more efficient. With Infor VISUAL CRM, you get:

Contact Center—A standard component in VISUAL, the contact center module tracks everything there is to know about customers and prospects, using information that is updated and available instantly. View histories, tasks, sales data, and other back-office data for every contact at every account. With the Contact Center, you will:

- Access company, product, and pricing information with a customizable electronic bulletin board.
- Instantly send information to multiple contacts using mail-merge capabilities.
- Schedule and assign tasks and activities.
- Convert prospects to customers automatically.
- Develop on-the-fly custom reports.

Sales—Improve the effectiveness of your sales team with capabilities to:

- Develop price quotes and accurately configure products using an optional parametric configurator.
- Convert quotes to estimates and orders automatically.

- Develop sales plans to chart the next step in a sales cycle.
- Create estimates using an estimating window.
- Develop and analyze revenue pipelines.

Help Desk—Improve the productivity of help desk employees by allowing them to:

- Automatically track customer calls and creating a knowledge base of issues and resolutions.
- Prioritize calls and assigning them to specialists for resolution.
- Log calls according to specific product information such as product category, serial number, and servicer contract.
- Track and invoice billable hours.

Field Service—Make field service operations more efficient with capabilities to:

- Centrally manage service orders, warranty and maintenance contracts, dispatch scheduling, return material authorizations, and billing.
- Better manage inventory and labor to avoid service delays.
- Trace issues by part identification number, serial number, or service contract.
- Automatically generate invoices and assign charges to the general ledger.

Marketing—Create and implement more effective marketing campaigns. With the Marketing module, you will:

- Develop marketing campaigns closely linked to your overall business strategy.
- More easily track the effectiveness of campaigns and events.
- Efficiently maintain a marketing literature catalog.
- Automate marketing literature fulfillment.

Admin—Improve administrative efficiency by allowing staff to:

- Create custom applications for administrative processes.
- Extend existing applications with user-defined fields.
- Make user access to the navigation bar, applications, reports, menus, and records secure.

Generate more revenue.

Infor VISUAL CRM streamlines how manufacturers like you capture, maintain, and distribute customer-related information throughout the enterprise. The solution will help you:

- Get more new customers.
- Increase the value from existing customers.
- Keep customers.
- Reduce operational costs.

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About Infor.

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