



# Infor CRM and ERP

## Gain clear visibility into the customer lifecycle

Today's enterprise has more options than ever before to get work done. But relying on multiple systems to access information can be frustrating. By integrating your CRM and ERP data, including detailed customer information, invoices, orders, and more, you can streamline your systems and have real conversations with your customers. Infor® CRM accomplishes all this by unifying your front-office CRM solution with your mission-critical back-office ERP system to give your cross-functional teams access to a wealth of customer information—all in one place.

## Start thinking outside the CRM box—and inside the inbox

By integrating Infor CRM with your ERP solution, you can be more responsive to customer needs. That way you can close more deals, service more customers, and improve customer service. Infor CRM provides you with rich, mobile access across popular smartphones and tablets for members of your team who need access when they're in the field. With a greater understanding of each account, your sales and service teams can take a more consultative approach to qualify customers better, run more credible sales cycles, and lower your total cost of sale. Additionally, you can access account information and other CRM functionality directly within Microsoft® Outlook via the embedded Xbar—and continue to work the way you work now.

Infor CRM integrates your disparate systems to deliver a comprehensive 360° view of your customers.

## Automate your business processes

Infor CRM's back office integration is powered by Infor ION®, Infor's purpose-built middleware that gives you an innovative framework to automate business processes, drive better decision making, and dramatically improve exception management. It allows you to connect Infor CRM and ERP solutions including LN, LX, SX.e, A+, M3, XA, VISUAL, and CloudSuite™ Industrial (SyteLine®)—so you can view all of your data across all of your systems.



### Enjoy seamless information access

Infor CRM gives your sales people the information they need to have insightful conversations and rich interactions with customers, prospects, and partners. The solution provides native multi-office, multi-company integrations and adds new tabs to Infor CRM so you can display mission-critical ERP information like:

- Customers and contacts
- Bill-to, ship-to, and pay-from
- Quotes and sales orders
- Shipments and returns
- Receivables and invoices
- Products and locations
- Real-time pricing
- Availability to promise

## Create a consistently flawless experience

Infor CRM delivers a comprehensive 360° view of your customers, contacts, transactions, and products by integrating your disparate systems and data sources into a single view. You can use Infor CRM as a hub to manage and track your customer interactions across teams. You can also use Infor CRM to connect processes, share intelligence, and deliver a consistently flawless customer experience.

### Help key team members deliver great customer interactions

Infor CRM equips your team with the information it needs to provide a consistent customer experience at any point during your customer's journey. Here's a look at some of the extended data you gain by integrating your CRM and ERP solutions.

**Sales managers**—Use holistic customer experience data to teach sales staff how to be better at building relationships. Customer history data can also be used to predict forecasts and your pipeline.

**Sales representatives**—View complete information about customer interactions across all departments to forge closer customer relationships. Gain valuable insights into the account receivables that can affect commissions.

**Marketing managers**—Gain insights into the products that have high tickets/returns, and avoid promoting them. Know what customers have outstanding invoices and use this information to create better campaign list segmentations.

**Service/support representatives**—Get instant access to sales orders and return details to rapidly resolve customer calls. Confirm ship-to, bill-to, and pay-from details to ensure proper deliveries. And, use CRM and ERP data to address receivable and invoice issues.

## Discover your options

Infor CRM offers a complete view of every customer touch point across your sales, marketing, customer service, and support teams. With Infor CRM, you can maximize the impact of every interaction—across the entire customer lifecycle—whether in the office or out in the field. And thanks to Infor CRM industry-specific capabilities, you can take control of how you deploy, use, and pay for your solution. Best of all, Infor CRM's back office integration is available out-of-the-box with Infor CRM, and can be deployed in the cloud or on-premise.



### Unify all of your data and systems

By integrating your CRM and ERP, you can:

- Access company information managed in multiple systems quickly and easily.
- Enable seamless cross-functional collaboration with your teams.
- Make changes to information and have the updates synchronize across your systems.
- Easily monitor your entire business and make better decisions faster.
- Lower your TCO and simplify upgrades.

[Learn more about Infor CRM >](#)

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