

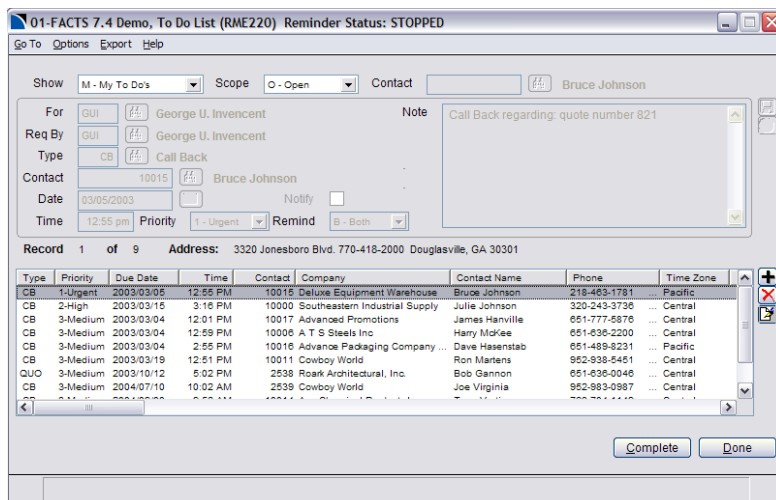


FACTS Data Sheet: Relationship Management

The core features in Relationship Management bring consistency and efficiency to critical business processes.

The FACTS Relationship Management solution (RM) is a powerful tool to manage prospects, customers and vendors. RM also brings discipline and efficiency to business processes such as sales, vendor management, credit and collections, returns management and more. The core building blocks of Relationship Management include:

- Unlimited Contact information, Notes and To Do items
- Process flow combined with powerful filtering capabilities to create targeted lists of contacts to be used for call lists, broadcasts, notes review or exporting to Excel
- Go To and Options menus that are incorporated into virtually all RM programs to access standard FACTS entry programs and inquires, send email and letters, create Notes and Tos, maintain contact information.



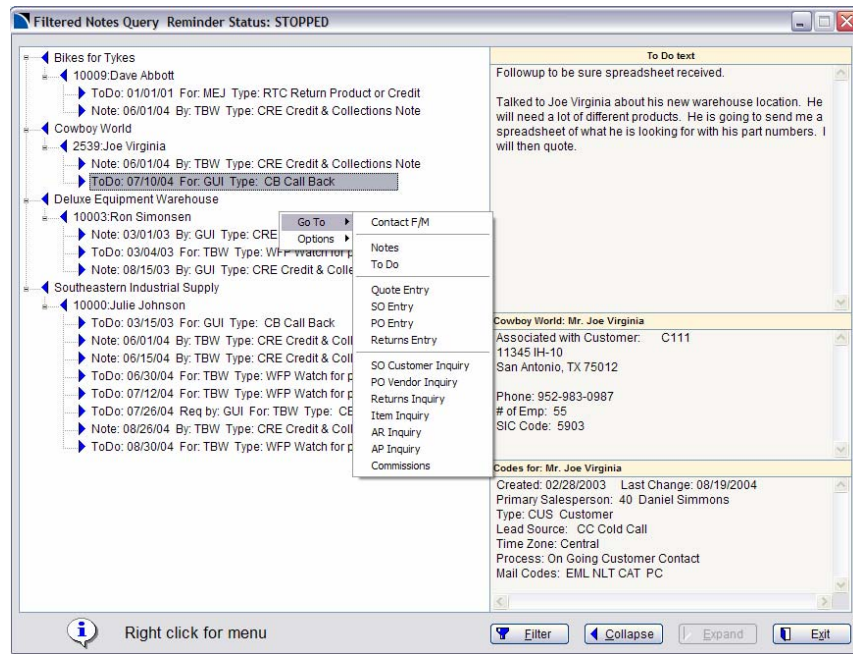
➔ A PARTNER SOLUTION ...

Developed by Pivotal Systems, an Authorized Infor Solution Partner, Relationship Management is certified by Infor as a leading solution for FACTS. By selectively creating alliances with partners that maintain the same the same rigorous quality standards for programming, design and functionality, Infor provides our customers with an expanded and enhanced FACTS solution.

Flexibility & Consistency: User defined codes for contact types, note types, To Do types, mail codes, lead sources, process flows and email & letter templates allow RM to be configured to match your business requirements. Mail & letter templates, notes and To Dos all support default text with run time replacements to personalize and automate repetitive tasks and provide a consistent corporate image.

Automatic Activity-Specific Notes: Activity specific notes are created when quotes are entered or converted, SO & PO documents are entered or changed, To Do items are completed, email and letters are sent. All notes support default text and run time replacements for increased productivity and ease of use. Using the Filtered Notes query allows you to slice and dice notes by type and date ranges to provide unique views into your contact data.

Visibility & Security: A powerful filter combined with process flow capability allows the tracking of any business process from sales to credit & collections to vendor returns. Company-wide visibility of relationship details, storage and enhanced security protect valuable assets.



Technical Requirements

Relationship Management runs only in graphical mode. Minimum recommended screen resolution is 1024x768 or higher. The email capability requires a full time TCP/IP connection to an Internet SMTP mail server. Relationship Management uses the ProvideX Internet Toolkit, which is included in the price of the module. FaxLink is required for broadcast fax capabilities.

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