



FACTS Data Sheet: RM Work Centers

RM Work Centers allow users to capture every touch you have with customers and prospects and see it all in a detailed chronological history.

Relationship Management (RM) Work Centers are native tools designed to focus and manage the various activities related to sales opportunities, pipeline analysis, credit / collections, quote management and user definable customer profiles.

Productivity: All of the programs and information needed for Credit & Collections, Opportunity Manager and Quote Manager are available from within the Work Center. Use filters and views to focus on priority items.

Drill Down to Source Data: Create and edit quotes, send past invoices and statements, maintain customer data and open invoices, synchronize with customer inquiries all from the Work Center.

Flexibility: Work Centers provide an easy to use, intuitive and flexible means to select specific data fields relating to the Work Center, filter the records to display, define & display multiple views, perform high level inquiries with drill down capability and export the results to Excel.

Drag & Drop: Work Centers have been designed to be intuitive and easy to use. Drag & drop technology has been incorporated specifically for the end user to configure and maintain:

- Views – the data in the left panel, up to 15 views can be defined for each Work Center
- Filters – the criteria used to limit the data shown in the tree-view and stored in templates
- Export to Excel – use templates to store the fields and order for export to Excel

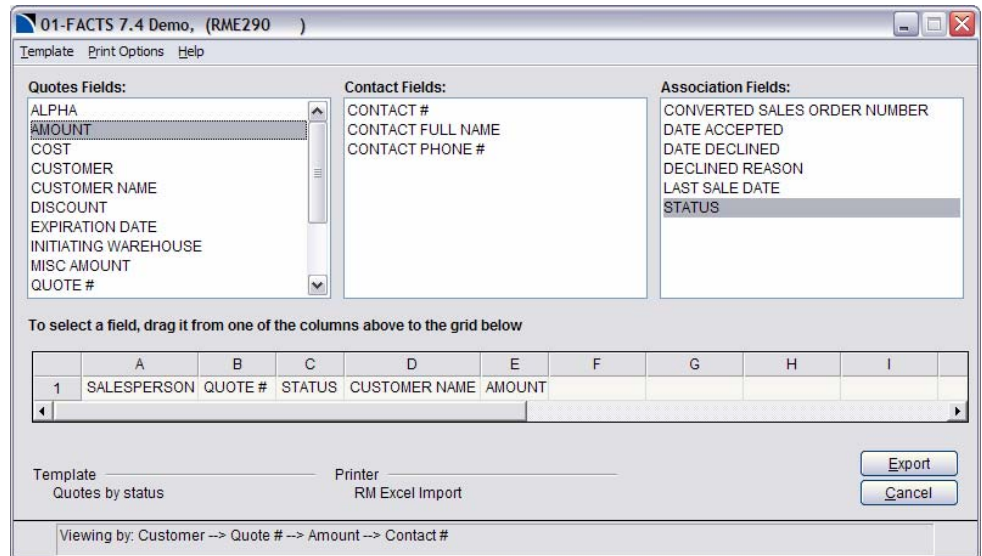
➔ A PARTNER SOLUTION ...

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.

External Documents such as spreadsheets or Word documents can be attached to Work Center items and can be opened from within the Work Center

Features Common to all RM Work Centers:

- A user definable tree view panel allowing up to 6 levels of detail and 15 views
- A chronological history of all activities generated from within the Work Center. Activities can include notes, to do items, file maintenance changes, attached documents, email, etc.
- Multiple user configurable views and view elements via user friendly drag & drop tools
- Multiple user defined filters via user friendly drag & drop tools
- Export contents of the Work Center to Excel via templates similar to report templates
- Access to standard RM Go To or right click menus providing access the core capabilities
- Synchronization with standard FACTS inquiries
- Context sensitive buttons for new entry, edit highlighted entry and additional programs relating to the specific Work Center, User preferences for views and filters
- Context sensitive buttons for customer, item, vendor and document notes
- Configurable by your Solution Partner to incorporate custom data or other related FACTS files and to add additional drill downs, etc.
- Work Centers developed within the new FACTS architecture and are metadata driven



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. RM 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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