

INFOR CRM 8.3

INFOR CRM NEW FEATURES: XBAR

- XBAR replaces Outlook Integration.
- Ability to Edit and update a Ticket's **area, category and issue**

Area	Category	Issue
TaskCentre	General	
Act	Server	
Infor CRM	Client - Web	Client - Windows
Web Site	Client - Windows	
INTERNAL		

Ticket # 001-00-000181

Subject Julie could not add new service tickets for any account

Account Success with CRM Cc

Contact Cooper, Julie

Assigned To Wooden, Dick

Urgency Medium

Needed By 3/4/2016 6:45 PM

Status Open

Area Infor CRM

Category Client - Web

Issue

- Scheduling Activities now has ability to easily link to information and create new Activities in Infor CRM. Each activity can now be quickly linked to **Contacts/Accounts/Opportunities/Tickets** and Infor CRM Meeting Types can be set from **here** as well.

1. Can link to CRM contact, account and optional opportunity / ticket

2. Pick 1 of 3 types of CRM activities

3. Easily complete the Outlook activity & update CRM automatically

- Then **when the activity is completed it can be easily done while in Outlook**, thus inserting or updating Infor all at once, dynamically.

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- Clicking on any of the hyper-links in the "Details" section will show a mini view of information directly from Infor CRM.

The screenshot shows a contact record for Jack Tucker, an Owner at Premier Woods, Inc. The form includes fields for contact information, account details, and communication preferences. A 'Go to CRM' button is visible next to the contact name. A status message at the bottom indicates 'Unable to connect to retrieve additional data'.

Field	Value
Contact	Jack Tucker
Type	
First name	Jack
Last name	Tucker
Middle name	
Suffix	
Account	Premier Woods, Inc.
Work	(574) 849-3405
Fax	
Mobile	(574) 370-3326
Home	
Pager	
Email	blackjack5151@gmail.com
Web	
Address	25856 Borg Rd
City	Elkhart
State	IN
Postal	46515
Country	
Primary Contact	<input checked="" type="checkbox"/>

- You can also link the Outlook activity to related entities such as other people, accounts, opportunities, tickets, users, etc. to build a richer history of the interactions and relationships. This is like the multiple attendee ability found in Infor CRM 8.2

The screenshot shows a table of related entities for Jack Tucker. The table lists Name, Account Name, Entity Type, Phone number, and Email for three contacts.

Name	Account Name	Entity Type	Phone number	Email
Jack Tucker	Premier Woods, Inc.	Contact	(574) 849-3405	blackjack5151@gmail.com
Julie OShea	Chicago White Sox INT	Contact	(312) 674-5405	joshea@chisox.com
Glenn Deems	Infor CRM (Saleslogix)	Contact	(770) 870-1555	glenn.deems@infor.com

- Ability to control the amount of information you will see on a Member Card.
- Set the number of member cards to display for emails with lots of email addresses
- Use an Opportunity group and a Ticket Group to narrow the results shown on the member card- helpful to only show information that you care to see.

The screenshot shows the 'Configure Member View' settings page in Infor CRM. The page allows users to modify how member information appears. Key settings include the default email filter, the number of members to display, and the opportunity and ticket groups used for filtering.

Setting	Value
Default email filter	From
Members to display	3
Members "Load More" adds	6
Opportunity Group	My Open Opportunities
Ticket Group	All Open