empath-e
MAKING CRM MAKE SENSE

Infor CRM Xbar for Outlook

Date: 26/03/2021
Version: 1.0
Author: Adam Travers
Contact: 0845 1368449

INTRODUCTION

Infor CRM Xbar for Microsoft Outlook is an add-in to Infor CRM that seamlessly embeds the functionality of CRM into Microsoft Outlook. Infor CRM Xbar for Microsoft Outlook enables you to access your most important CRM information and functionality through an intuitive, context-aware window that is "docked" within the Microsoft Outlook interface.

You can access a wide range of information and activities, including interaction history, follow-up action items, leads generated from e-marketing campaigns, and opportunity management. Work with and modify the CRM information, taking actions and updating the information as necessary, all from within Microsoft Outlook and without losing sight of your Microsoft Outlook inbox. Using Infor CRM Xbar for Microsoft Outlook, you can:

- Access a contact in Microsoft Outlook by opening e-mail correspondence or calendar activities. The Xbar pane instantly displays key information, activities, and opportunities stored in CRM for that contact.
- Create entirely new contacts, accounts and opportunities, often by quickly and conveniently dragging and dropping existing information from e-mail into the Xbar interface.
- Make changes to contact, calendar and interaction history in the Xbar that automatically update within CRM in real-time, ensuring other team members can immediately see and access the updated information.
- Use Infor CRM Outlook Sync to synchronise Contacts and Calendar between Infor CRM and Microsoft Outlook.
- Use the Infor CRM Outlook Integration features:

  - Send to CRM and Record to History
  - Outlook Synchronisation of Contacts and Activities
  - Infor CRM Address Book
  - Drag and Drop E-mail from Microsoft Outlook
  - Send an Infor CRM contact's information in a vCard file format via e-mail
  - Attach documents from Infor CRM Library to a message in Microsoft Outlook