

Xbar places CRM functionality directly within the Outlook environment so you can turn your unstructured email information into defined tasks, opportunities, leads, accounts, tickets, and more. You don't need to open Infor CRM, it is already working inside Outlook. The ability to view lead, contact, and account information from Infor CRM within Outlook delivers a more complete picture of your customers and improves communications as well as decision making.

Xbar for Outlook Key Feature & Benefits

- Turn unstructured email threads into defined tasks, opportunities, leads, accounts and tickets
- View important lead, contact, account, and opportunity information from Infor CRM within Outlook to improve your email communications
- Click on an email, conversation thread, or activity in Outlook and the Xbar will look up and display related CRM data, including phone numbers, email address, webpages, as well any “associations” they may have in the Infor CRM database
- Click the “View in Infor CRM” button to instantly open the full lead/contact profile in Infor CRM
- Drag and drop email signatures from Outlook to quickly create new contacts, leads, and tickets in Infor CRM which saves time and effort
- Convenient new icons in the Xbar for Outlook alert you to pending work, past due activities, open opportunities, open tickets, duplicates and more
- A card view option allows users to see everyone in Infor CRM associated with a specific account, contact, lead, email thread, or opportunity

“Using Xbar has made it incredibly easy to stay on top of recording my history and activities in CRM. Instead of jumping back and forth from Outlook to Infor CRM, I just take care of it all in my Outlook!”

- Emily Rentschler, Dealer Development at Fecon

