

# Check-in – Infor CRM SLX mobile add-on for anywhere updates

## CHALLENGE

Completing status updates of store shelves and/or trips can be very time intensive when notes are taken one-time, only to be entered into another system later.

## SOLUTION

KIK Consumer Products selected Infor CRM SLX and the Check-in add-on, because of ability of Check-in to allow for real-time CRM updates at a customers office or retail location.

## RESULTS

Sales reps have the customer data they need available anywhere, any-time. A single centralized database boosts productivity and eliminates duplicate data entry. Insight into sales related activity helps managers refine and improve the company's sales processes. Check-in allows the mobile sales team to update inventory status on customers store shelves immediately upon visiting each location.



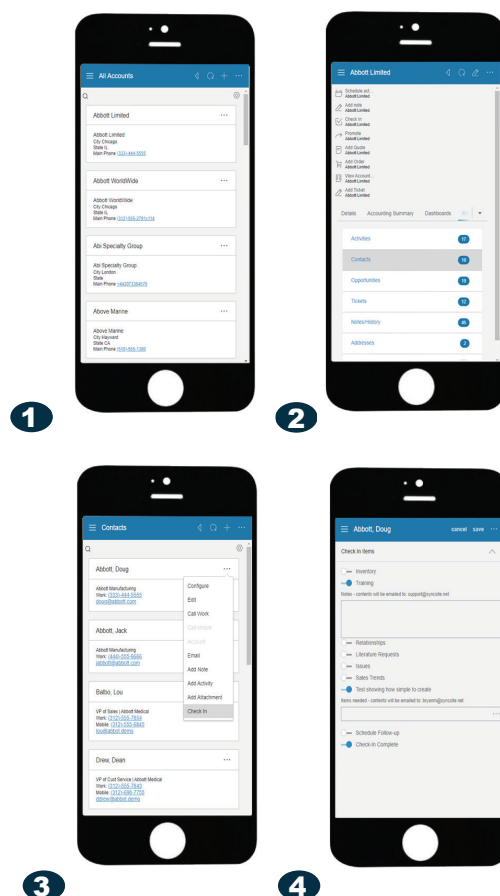
Fast updates of CRM through the mobile version provide the following:

- Quick update of any contact
- Easily configured in CRM
- Voice-to-text and pick list updates
- Updates save to CRM
- Updates can email alerts
- Can work in off-line mode

Check-in from Syncsite provides on-the-go updates for Infor CRM SLX quickly and easily. Check-in leverages the ability to use voice-to-text on your mobile device to record meeting/status notes and/or toggle pick list options anywhere. Furthermore, the mobile version of Infor CRM SLX provides a detailed view of your customers' businesses, their history and all open and pending transactions. It enables your sales, support, marketing and customer service teams to work within a powerful, user-friendly CRM system while still accessing sales history, order history and tickets and more. It's a combination that will increase staff productivity, enhance your sales/marketing efforts and improve your service levels. Check-in simply makes updating that customer data fast and easy no matter where you are.

## HOW CHECK-IN WORKS

- Go to the accounts option in mobile (*screen one*)
- Choose the contacts at the account (*screen two*)
- Go to the contact that the Check-in messages should be saved and tap "three dots" to launch the drop down and choose "Check-in" (*screen three*)
- Tap the toggles that apply to the contact and use the pick lists and/or the text boxes and use voice-to-text and save when done (*screen four*)



# Check-in – Infor CRM SLX mobile add-on for anywhere updates

“Infor CRM is flexible, adaptable and scalable, and Syncsite is a great partner to work with. They are responsive, conscientious and always available and the Check-in add-on works great”  
Steve Kucskar, Director of Sales, Pro Dealer Division at KIK

## MORE

For more information on any of our products or services please visit us on-line at:

[www.syncsite.net](http://www.syncsite.net)

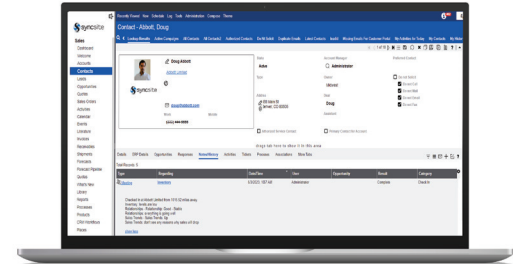
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- View your Check-in saved entry in CRM under that contact record anytime – Check-in marks the location of where it is saved based on the GPS location of the user compared to the account address (*screen five and six*)
- Check-in also works when no Internet/data connection is available in an off-line mode
- Infor CRM SLX is device agnostic since it uses HTML 5 to deliver the content. It looks and runs the same no matter the operating system of the mobile device.



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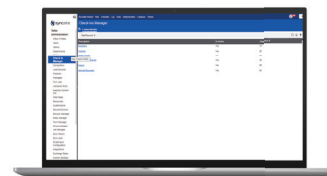
Type	Regarding	Date/Time
Meeting	Inventory	5/3/2023, 9:49 AM

Checked in at Abbott Limited from 1015.52 miles away.  
Inventory: levels are low  
Relationships - Relationship: Good - Stable  
Relationships: everything is going well  
Sales Trends - Sales Trends: Up  
Sales Trends: don't see any reasons why sales will drop

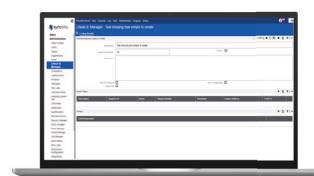
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## HOW CHECK-IN IS SETUP IN CRM

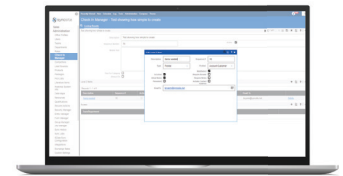
- Any admin user of Infor CRM SLX can access the Check-in manager to update/create new choices quickly and easily without any coding required (*screen seven*)
- The admin can “add new Check-in item” and create the new Check-in or update one already there (*screen eight*)
- New/existing Check-ins can have text fields for voice-to-text entry and/or pick-lists to chose in the mobile version of Infor CRM SLX; click save and done (*screen nine*)



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## About Syncsite

Syncsite is a premier provider of Customer Relationship Management (CRM), Dynamic Financial Planning (FP&A), Business Intelligence (BI) and Marketing Automation (MA) solutions. We empower companies in a variety of industries to manage their business data and leverage this information to strengthen customer relationships and enhance profitability.