

Inforgen Features

Marketing department

Contacts

Leads and prospects

- ✓ Customer lifecycle; lead - prospect - customer
- ✓ Automatic lifecycle progression
- ✓ Import leads and prospects
- ✓ Lead and prospect browser
- ✓ Generate tasks for lead & prospect follow up

Customers

- ✓ Create and manage customer records
- ✓ Link parent, subsidiary & additional contacts
- ✓ Store all customer activity and history
- ✓ Add new customer data capture fields
- ✓ All customer correspondence is tracked
- ✓ Import and export new and existing contacts

Customer upload

- ✓ Import new customers
- ✓ Bulk manage accounts
- ✓ Export existing customers

Products

Product management

- ✓ Set up stock, service, voucher, activity and rental products
- ✓ Import new products
- ✓ Export existing products
- ✓ Manage products in bulk
- ✓ Maintain product advertising content
- ✓ Create packages containing multiple products
- ✓ Display on third party websites via web API
- ✓ Configure product bolt-on, alternative and cross sales
- ✓ Define search and filter terms
- ✓ Optimised for search engines and users
- ✓ Manage product availability

Product groups

- ✓ Segment products by features and attributes
- ✓ Group products together for promotions
- ✓ Search and filter by product group

Price lists

- ✓ Create customer, supplier and platform price lists
- ✓ Manage product profitability
- ✓ Manage tax bands based on location

Promotions

Promotion codes

- ✓ Generate and use promotion codes
- ✓ Use % and value discounts
- ✓ Set product, date and user qualifications
- ✓ Redeem promotions on all order types

Campaigns

- ✓ Create, send and report on email campaigns
- ✓ Refine and segment recipient lists
- ✓ Schedule ad hoc and recurring campaigns
- ✓ Generate tasks for your team in bulk

Gift vouchers

- ✓ Set up gift voucher templates
- ✓ Create single and multiple use vouchers
- ✓ Define sale price and redemption values
- ✓ Configure expiry rules and tolerance period
- ✓ Create and manage gift vouchers in batch
- ✓ Sell through multiple channels
- ✓ Send gift vouchers by email, post or sms
- ✓ Redeem vouchers as payment
- ✓ Follow gift vouchers through lifecycle
- ✓ Gift voucher reports

Reports

Pipeline reports

- ✓ Enquiries
- ✓ Order source
- ✓ Quotations
- ✓ Sales pipeline detail report
- ✓ Sales pipeline including future contracts
- ✓ Sales pipeline summary

Booking and rental reports

- ✓ Booking details
- ✓ Booking participants
- ✓ Rental details
- ✓ Rental summary

Order reports

- ✓ Sales order
- ✓ Sales order detail
- ✓ Sales orders by product
- ✓ Sales order invoicing report

Invoice reports

- ✓ Sales invoice allocation
- ✓ Sales invoice by customer
- ✓ Sales invoice by date
- ✓ Sales invoice by product
- ✓ Sales invoice detail by location
- ✓ Sales invoice detail
- ✓ Sales invoices

API

Contact API

- ✓ Create and edit Leads, Prospects, Customers
- ✓ Login to Private Area
- ✓ etc....

Enquiries and sales API

- ✓ Capture Leads
- ✓ Capture Sales Order and Payments
- ✓ etc...

Sales department

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Contracts

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- ✓ Manage sales, support and rental contracts
- ✓ Set up recurring sales from contracts

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Sales

Opportunities

- ✓ Enquiry and quotation browser
- ✓ Record product, service and booking interest
- ✓ Create new and view existing notes
- ✓ View notifications and resolve exceptions
- ✓ Standard enquiry and quotation workflow
- ✓ Tracked approval and cancellation process
- ✓ Track all correspondence
- ✓ Automatic creation of quote from enquiry
- ✓ Automatic creation of order from quotation
- ✓ Sales cycle; enquiry - quote - order – invoice

Bookings and rentals

- ✓ Sell participant **places** and time slots
- ✓ Real-time availability updates
- ✓ View, search and refine booking opportunities
- ✓ Send links for suitable products to customers
- ✓ Manage time, place and participants
- ✓ Check-in, check-out and complete bookings
- ✓ Standard booking and rental workflows

Sales invoice

- ✓ Post sales invoices to accounts
- ✓ Strict approval process
- ✓ Standard invoice workflow
- ✓ Adjust posted dates on invoices
- ✓ Link credit notes to invoices

Orders

- ✓ Sales order browser
- ✓ Capture sales orders from multiple sources
- ✓ Create new and view existing notes
- ✓ View and resolve order exceptions
- ✓ Alerts identify potential fraud
- ✓ Process returns and exchanges
- ✓ Mange order approval in bulk
- ✓ Standard sales order process
- ✓ View related documents and correspondence
- ✓ Invoice created after order completion

Payments

- ✓ Capture customer payments
- ✓ Use trusted payment providers
- ✓ Accept deposits and part payments
- ✓ Run reconciliation reports
- ✓ Payment by gift voucher, cash, card or credit
- ✓ View by date range, payment status and type

Reports

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Order reports

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- ✓ Sales order detail
- ✓ Sales orders by product
- ✓ Sales order invoicing report

Invoice reports

- ✓ Sales invoice allocation
- ✓ Sales invoice by customer
- ✓ Sales invoice by date
- ✓ Sales invoice by product
- ✓ Sales invoice detail by location
- ✓ Sales invoice detail
- ✓ Sales invoices

Booking and rental reports

- ✓ Booking details
- ✓ Booking participants
- ✓ Rental details
- ✓ Rental summary

Payment Reports

- ✓ Customer deposits
- ✓ Customer payments (date created)
- ✓ Customer payments (date received)

Operations department

Customer services

Help desk

- ✓ All customer information available from account
- ✓ View all customer activity and history
- ✓ All customer correspondence is tracked
- ✓ View, log and assign tasks

Warranty

- ✓ Warranty coverage
- ✓ Warranty expiration date
- ✓ Assets out of warranty in next 30 days

Returns and exchanges

- ✓ Raise / process return and exchange orders
- ✓ Return product to stock
- ✓ Quarantine returned stock
- ✓ Add notes to orders and stock items
- ✓ Rule driven approval process
- ✓ Automatic exchange order value calculation
- ✓ Full audit trail linked to original documents

Stock

Purchase order

- ✓ Manually raise purchase order
- ✓ Adjust purchase order items
- ✓ Link PO to supplier
- ✓ Link PO to supplier price list
- ✓ Automatically generate PO based on stock levels
- ✓ Automatic PO generation to fulfil sales orders
- ✓ Automatic PO generation in line with drop ship process
- ✓ Apply discounts or surcharges
- ✓ Submit purchase order by email or letter
- ✓ PO linked to orders and customer accounts
- ✓ Goods receipt note automatically created
- ✓ Integration to delivery algorithm

Goods In

- ✓ Match goods receipt note to purchase order
- ✓ Barcode scan items on receipt
- ✓ Print barcodes from GRN
- ✓ Highlight items expected and not received
- ✓ Highlight items expected but not received
- ✓ Highlight items not expected but received
- ✓ Create stock automatically
- ✓ Process returns

Stock

- ✓ View, move and adjust stock
- ✓ Add stock manually
- ✓ Upload stock from file
- ✓ Goods receipt note process creates stock
- ✓ Stock reservation
- ✓ Stock allocation and deallocation
- ✓ Configurable stock categories
- ✓ Complete stock history
- ✓ Stock cost value
- ✓ Minimum stock reorder level
- ✓ Stock serial numbers
- ✓ Stock batch numbers
- ✓ Default stock location
- ✓ Stock cost and value
- ✓ Stock count manually and via mobile device
- ✓ Drop ship process integration
- ✓ Integration of stock with third party
- ✓ Order fulfilment and stock integration
- ✓ Products and stock Integration
- ✓ Public site API and stock integration
- ✓ Purchasing (PO) and stock integration
- ✓ Sales and Stock integration
- ✓ Stock - bill of materials integration
- ✓ Stock - courier integration
- ✓ Tasks integration with stock

Service

Resource

- ✓ Resource calendar view
- ✓ Manage available, allocated and unavailable resources
- ✓ View resource by date, time, location, employee or label
- ✓ View assigned / unassigned tasks
- ✓ Manage resource task allocation individually or in bulk
- ✓ View updates from browser

Activities

- ✓ Amend an activity booking
- ✓ Amend session availability
- ✓ Change participant status
- ✓ Check in activity booking
- ✓ Complete an activity booking
- ✓ Create an activity booking
- ✓ Move participants within an activity booking
- ✓ Return an activity product item
- ✓ View availability for an activity booking
- ✓ View daily check in screen
- ✓ Manage participants in bulk

Job sheets and forms

- ✓ Create action based process flows
- ✓ Link to different forms
- ✓ Capture data electronically
- ✓ Configure data validation
- ✓ Record and view electronic signature

Jobs

- ✓ Set up different task types
- ✓ Associate to a single customer
- ✓ Group tasks with labels
- ✓ Provide time estimates
- ✓ Define task priority
- ✓ Add sub-tasks
- ✓ Create sibling tasks
- ✓ Create task dependencies
- ✓ Link tasks to sales document
- ✓ Add resources to tasks
- ✓ Record time taken on task
- ✓ Show % completion
- ✓ Parent task time estimates automatically calculated
- ✓ Set desired and estimated completion date / time

Rentals

- ✓ Apply cancellation cover surcharge
- ✓ Change rental booking date, package and party size
- ✓ Check in / check out rental booking
- ✓ Search and Filter rental booking dashboard
- ✓ Manage rental booking workflow
- ✓ Complete rental booking
- ✓ Process rental booking deposit refunds
- ✓ Release cancelled rental booking slots
- ✓ Self Billing for rentals
- ✓ Add key attributes for rental comparison
- ✓ Assign rental owner and caretaker

Despatch

Picking

- ✓ Pick list automatically generated from orders
- ✓ Pick list manually generated from selected orders
- ✓ Pickers select a trolley for picking items
- ✓ Pick order by delivery service / shipping method
- ✓ Pick order by despatch date
- ✓ Pick order by creation date
- ✓ Pick order by delivery zone
- ✓ Pick order by warehouse location
- ✓ Pick order by product
- ✓ Configure picking algorithm for efficient pick routes
- ✓ Pick stock from a different place to allocated
- ✓ Picking Exception Process
- ✓ Print delivery notes once items are picked
- ✓ Pick with barcode scanning

Packing

- ✓ Item trolley receipt
- ✓ Delivery documents receipt
- ✓ Items grouped by sales order

Despatch

- ✓ Mark order as despatched
- ✓ Despatch label printing
- ✓ Courier integration

Courier integration

- ✓ Integration with royal mail
- ✓ Integration with UPS
- ✓ Delivery note added to courier manifest

Planning

Order management

- ✓ Confirmed sales orders
- ✓ Organise orders for processing
- ✓ Export orders

Work order

- ✓ Automatic creation on sales order approval
- ✓ Fulfil sales orders with products and services
- ✓ Automatically add and link tasks
- ✓ Manually add and link tasks
- ✓ Supports quick despatch, picking and packing, drop ship and back orders
- ✓ Split / merge work orders

Scheduling

- ✓ Manage tasks individually or in bulk
- ✓ Update status
- ✓ Change priorities
- ✓ Change % complete
- ✓ Change start date
- ✓ Change assignee

Project management

- ✓ Organise tasks into releases
- ✓ Add documents and links to tasks
- ✓ Set timelines for task completion
- ✓ Track work complete, scheduled and due
- ✓ Full task audit trail
- ✓ Send updates to customers
- ✓ Export tasks for review

HR Department

Employees

Employee record

- ✓ Employee contact details and additional contacts
- ✓ Add notes to employee records
- ✓ Correspondence tracking
- ✓ Attachments on employee record
- ✓ Hyperlinks on employee record
- ✓ Employee notifications & exceptions
- ✓ Employees labels
- ✓ Set employee user name and password
- ✓ Link employee to an employee group
- ✓ Set employee location

Employee group

- ✓ Groups employees by location
- ✓ Manually create employee groups
- ✓ Set employee group security settings
- ✓ Set system access levels

Resource

Availability

- ✓ Employee calendar
- ✓ Manage employee availability
- ✓ Manage working days of the week
- ✓ Manage working times of the day
- ✓ Manage fixed task times
- ✓ Manage exception dates
- ✓ Employee rota
- ✓ Configure slot times

Skills

- ✓ Manage employee resource type
- ✓ Allocate tasks based on resource type

Training

- ✓ Training calendar
- ✓ Track training time

Holiday

- ✓ Holiday calendar
- ✓ Track holiday entitlement / accrual / allocation

Sickness

- ✓ Sickness calendar
- ✓ Track sickness, bereavement, maternity and paternity

Reports

Employee reports

- ✓ Timesheet report
- ✓ Performance report

Purchasing Department

Supplier

Supplier contacts

- ✓ Create and manage supplier records
- ✓ Link parent, subsidiary & additional contacts
- ✓ Store all supplier activity and history
- ✓ Add new supplier data capture fields
- ✓ Tracked supplier correspondence
- ✓ Import and export new and existing suppliers

Products

- ✓ Set supplier price list
- ✓ Set preferred supplier
- ✓ Product groups

Self billing

- ✓ Automatically raise purchase invoice on creation of sales order
- ✓ Preferred supplier is selected

Price lists

- ✓ Create price lists for different suppliers
- ✓ Set supplier currency
- ✓ Set supplier location
- ✓ Manage products to supplier price list in bulk

Inventory

Stock

- ✓ View, move and adjust stock
- ✓ Add stock manually
- ✓ Upload stock from file
- ✓ Goods receipt note process creates stock
- ✓ Stock reservation
- ✓ Stock allocation and deallocation
- ✓ Configurable stock categories
- ✓ Complete stock history
- ✓ Stock cost value
- ✓ Minimum stock reorder level
- ✓ Stock serial numbers
- ✓ Stock batch numbers
- ✓ Default stock location
- ✓ Stock cost and value
- ✓ Stock count manually and via mobile device
- ✓ Drop ship process integration
- ✓ Integration of stock with third party
- ✓ Order fulfilment and stock integration
- ✓ Products and stock Integration
- ✓ Public site API and stock integration
- ✓ Purchasing (PO) and stock integration
- ✓ Sales and Stock integration
- ✓ Stock - bill of materials integration
- ✓ Stock - courier integration
- ✓ Tasks integration with stock

Assets

- ✓ Asset tag numbers
- ✓ Asset groups
- ✓ Asset types
- ✓ Asset locations
- ✓ Asset Availability Calendar
- ✓ Configurable asset fields
- ✓ Depreciation
- ✓ Move, dispose recycle sell assets
- ✓ Integration to customers, employees and contracts
- ✓ Integration to purchase orders
- ✓ Integration to tasks
- ✓ Asset label printing

Purchase orders

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Matching

- ✓ Match purchase invoice, goods receipt note and purchase order
- ✓ Manage the approval process
- ✓ Matching exception management
- ✓ Goods receipt / invoice received (GR/IR) ledger account
- ✓ Match lines on a purchase invoice with items received on GR/IR Account
- ✓ Add line items to a purchase invoice via 3-way matching process

Accounts payable

Purchase ledger

- ✓ Allocate purchase invoices to supplier payments
- ✓ View a suppliers account balance
- ✓ View outstanding purchase invoices
- ✓ View unallocated supplier payments
- ✓ Enter purchase invoices
- ✓ Enter supplier payments
- ✓ Send correspondence

Purchase invoice

- ✓ Add Items onto purchase invoice using 3-way matching
- ✓ Approve / reject items on purchase invoice
- ✓ Automatically / manually create invoice
- ✓ Import purchase invoice from file
- ✓ Send approval confirmation to supplier
- ✓ Manually add items to a purchase invoice
- ✓ Standard purchase invoice workflow
- ✓ Add supplier payment on purchase invoice

Payments

- ✓ Captured on sales order, invoice and credit notes
- ✓ Recorded against customer accounts
- ✓ Payment by cash
- ✓ Payment by cheque
- ✓ Payment by gift voucher
- ✓ Payment by credit card (via payment gateway)
- ✓ Payment by PDQ
- ✓ Automatic balance collection and refunds
- ✓ Capture audit information
- ✓ Capture source document
- ✓ Capture payment details
- ✓ Track payment allocation information
- ✓ Add additional notes to payment
- ✓ Payment run

Credit notes

- ✓ Record credit on account
- ✓ Link credit note to invoice
- ✓ Redeem credit as payment

Reports

Purchasing reports

- ✓ Purchase invoices
- ✓ Invoices by supplier
- ✓ Invoices by product

Finance Department

Accounts receivable and payable

Ledgers

- ✓ Sales and purchase ledgers
- ✓ Record and monitor debtors / creditors
- ✓ View outstanding invoices
- ✓ View unallocated payments
- ✓ View allocation history
- ✓ View balance outstanding
- ✓ Record payments
- ✓ Allocate payments to invoices
- ✓ Send outstanding invoice correspondence
- ✓ Send payment receipt correspondence
- ✓ Send outstanding balance correspondence
- ✓ Send internal account information to employees
- ✓ Export ledger transactions

Sales invoice

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SKU

- ✓ Product item SKU
- ✓ Asset item SKU
- ✓ Detail stored on SKU
- ✓ Stock item code and name
- ✓ Barcodes and unique references
- ✓ Unit of measure
- ✓ Stock item properties
- ✓ Weight
- ✓ Default cost

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Product group

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API

Website API

- ✓ Address Lookup API
- ✓ Basket API
- ✓ Calendar API
- ✓ Common response objects API
- ✓ Contacts API
- ✓ Customer API
- ✓ Dynamic form API
- ✓ Employees API
- ✓ Locations API
- ✓ Notes API
- ✓ Product Items API
- ✓ Products API
- ✓ Promotions API
- ✓ Task Types API