

CRM





Simplifying your Success

CRM

for SYSPRO

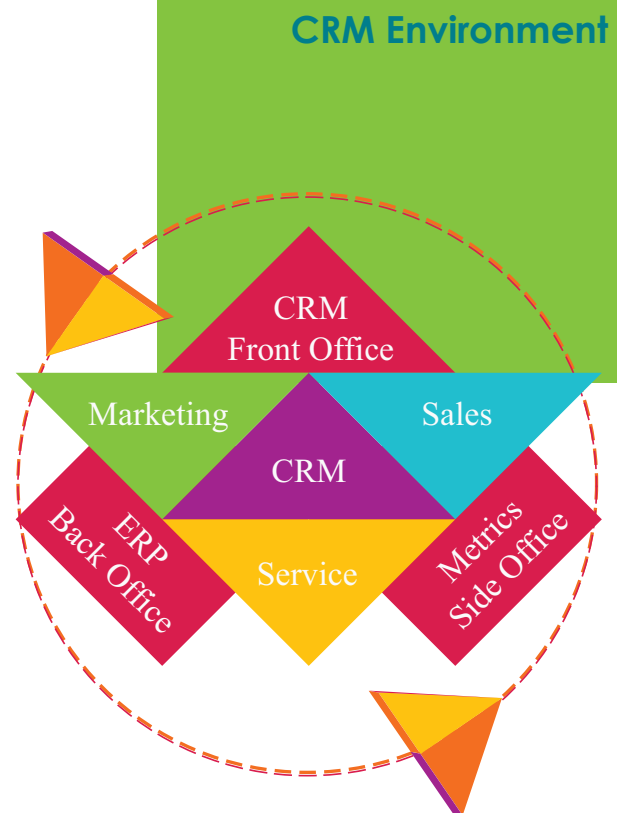
SYSPRO offers the dynamic Customer Relationship Management (CRM) and Supplier Relationship Management (SRM) functionalities that companies need to succeed in today's highly competitive environment.

CRM for SYSPRO is a comprehensive software solution that puts the customer at the epicenter of the business. By empowering companies to collect, analyze and utilize data to enhance customer relationships, the system becomes the foundation of a customer-based strategy to increase revenues, profitability and maximize ROI. Because the system fully integrates with SYSPRO's enterprise software, a company gains the power of an extended enterprise solution that encompasses Enterprise Resource Planning (ERP), E-Commerce, Warehouse Management and Advanced Planning and Scheduling (APS.)

CRM for SYSPRO provides a dynamic 360° view of each customer relationship. A collaboration engine allows authorized employees to share information about prospects, customers and vendors. All touch points, such as appointments, notes, invoices, tasks, service tickets, requests, telephone calls, emails and other revenue generating activities, are proactively managed and seamlessly integrated as part of the solution.

CRM for SYSPRO is a scalable solution designed to increase customer loyalty, lifetime retention and value by helping companies proactively understand and respond to customers' needs through cutting-edge technology and real-time collaboration.

The system incorporates key areas that include contact management, sales, marketing, service and fulfillment. It provides total visibility into patterns of change and highlights daily interaction on what is being marketed, sold, serviced and promised throughout the organization. Marketing, selling and service processes



are documented, managed and automated, resulting in the integration of quality customer-centric and marketing data.

CRM for SYSPRO lets a company harness and take ownership of contact data from inception. Information is stored at each contact touch point, eliminating the management of multiple incongruent databases and costly data duplication. The result is factual support for key management decision-making functions.

CAPABILITIES

Comprehensive Features - Outstanding CRM System

CRM for SYSPRO sets a new standard for feature-rich, integrated, performance-oriented and best-of-breed Customer Relationship Management.

Integrated Accessible Data

All authorized employees share the same current prospect, customer and vendor data. Remotely located employees, including field salespeople and service technicians, can access data via terminal service or bi-directional database synchronization with the main office.

Eliminate Duplicate Data Entry

Data entered into the system is available throughout the “front-office” CRM and “back-office” ERP modules. Duplicate data entry is eliminated, reducing unnecessary costs. Transactions can be initiated from either CRM or ERP screens to increase operational effectiveness.

Automate and Increase Productivity

Automation of business processes increase productivity and effectiveness by:

- ❖ Triggering automated processes automatically
- ❖ Sending alerts to employees and/or customers
- ❖ Dynamically tracking marketing campaigns
- ❖ Scheduling proactive service calls
- ❖ Automating responses to web-based leads
- ❖ Running dynamic telemarketing scripts
- ❖ Following up on important activities
- ❖ Escalating service issues

Secure and User Focused

CRM security includes:

- ❖ Powerful rights-based security and access control
- ❖ Restricting activities, appointments, tasks and/or attached documents
- ❖ Controlling access to features and data for each user (dashboards, record templates and data)
- ❖ Assigning rights to specific users or groups of users

Flexible Customization

Easy customization of CRM software enables:

- ❖ Unlimited user-defined fields and configurable templates
- ❖ Choice of MS SQL Server or Pervasive SQL back-end
- ❖ Creation of user-defined forms, folders and views
- ❖ Incorporating telemarketing scripts
- ❖ Tracking horizontal and vertical account relationships
- ❖ Linking activities and tasks to individuals as well as related accounts
- ❖ Modeling complex business processes with the unique Process Definition Language
- ❖ Quick and Easy design of company specific templates with Rapid Application Development and Deployment (RADD) technology

Scalable

CRM for SYSPRO supports the needs of customers with global operations with features, such as universal time zone support, multi currency tracking and country specific mailing label formats. The software scales from one to hundreds of users, enabling the system to grow with the business, securing a company's return on investment.





Managing MARKETING

CRM for SYSPRO can develop, execute and track marketing campaigns encompassing five components: target audience, offer, content, channel and call to action. All can be tested or re-used. “Triggers” automatically generate communication pieces, or fulfillments, based on responses. The CRM Marketing features include analytics for measuring results and developing new strategies.

Marketing Dashboard

The system also facilitates the easy management of customized marketing campaigns, ensuring that budgets are tracked and campaign expenses result in new sales opportunities. A marketing department dashboard provides the tools for establishing and executing effective, focused marketing campaigns.

Automated Marketing Process

The automation of business processes filters and enhances prospect and sales pipeline information and facilitates the efficient collection, qualification and conversion of leads into sales. Leads can be automatically categorized, assigned and expedited, allowing for effective tracking from inception to sale.

Marketing Metrics

The system enables a marketing department to gauge the success of marketing campaigns by tracking activities, costs and results of the campaigns. Metrics are automatically extracted from direct mail, trade shows, internet pages and other campaigns and presented as useful decision-support management information.

“You really need to think about your CRM applications and business processes in terms of how well they integrate with the rest of your customer-impacting and customer-touching applications and interaction touchpoints.”

- Patricia Seybold Group



Focused Marketing Execution

The Marketing Department dashboard provides the tools to establish, execute, track and report the success of any marketing-related campaign.

- ❖ Establish campaign records for unlimited, user-defined campaign types
- ❖ Automatic real-time graphic campaign metrics include
 - Key indicator analysis
 - Lead generation analysis
 - Response curve
 - Sales pipeline analysis
 - Sales cycle analysis
 - Financial/Revenue analysis
- ❖ Automatic triggering of marketing processes and campaign responses
- ❖ Unlimited user-defined fields/forms/folders can be attached to each campaign record
- ❖ Appointments, tasks and activities are linked to specific campaigns
- ❖ Attach unlimited documents of various types to each campaign
- ❖ Track estimated budgets and actual expenses related to each campaign
- ❖ Execute email and fax broadcasts, and direct mailings within each campaign
- ❖ Link account responses and opportunities resulting from specific campaigns

Managing SALES

CRM for SYSPRO provides visual monitoring of the details and progress of opportunities as they relate to sales process milestones. A sales knowledge base helps to close present and future opportunities by tracking competitors and buying issues while helping to predict customer and market trends.

Dynamic Selling Tools

CRM functionality gives the sales team the tools to shorten selling cycles, increase average deal sizes and improve win rates. Utilizing built-in advanced sales automation, a company can convert sales strategies into revenue opportunities.

CRM tools enable sales personnel to concentrate more time on selling. Forecasting, pipeline management and other daily sales tasks are automated, freeing sales personnel to focus on the customer. Managers can extract accurate and timely forecasts, which are automatically built by the daily entry of data into the CRM for SYSPRO database. Automatic creation of tasks and reminders result in an increase in the number of outbound calls and customer contact rates, raising customer satisfaction and selling activity.

Easy Data Integration

With the click of a mouse, a prospect is converted into a customer. Information changed within the Accounts Receivable module is automatically updated in CRM and vice versa. Sales Order transactions are recorded as activities in the history records within the CRM system. Detailed queries access the integrated data, presenting a fully integrated ERP and CRM environment.

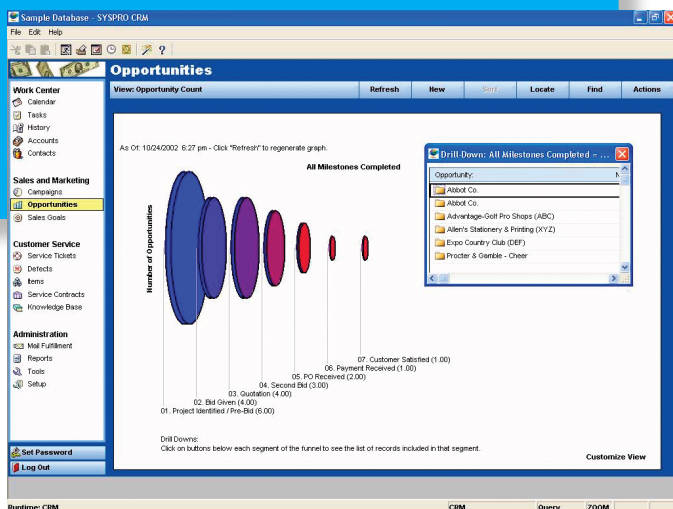
Total Collaboration

CRM facilitates total collaboration of inside and outside sales teams and streamlines sales strategies to achieve sales objectives.

Dynamic Sales Management

The Sales Department dashboard provides the facilities for maintaining information about accounts, contacts and the opportunities that result.

- ❖ Manage sales opportunities by creating and linking opportunity records to specific accounts
- ❖ Sales goals track by region and month
- ❖ Multiple currency support
- ❖ Automatic creation of sales opportunities
- ❖ Add unlimited user-defined fields/forms/folders to each opportunity record
- ❖ Maintain a complete history of activities with unlimited notes about each opportunity
- ❖ Create and links appointments, tasks and activities to specific sales opportunities
- ❖ Execute real-time, graphical sales pipeline reports based on user-defined metrics
- ❖ Track key sales milestones by utilizing sophisticated sales process management features
- ❖ Analyze competitors, buying issues and predict trends using the competitor knowledge base
- ❖ Produce sales expense and win/loss analyses through extensive reporting capabilities



CRM for SYSPRO provides advanced tools aimed at retaining customers, generating recurring revenue, and extending customer lifetime and value with an emphasis on increasing sales and profitability.

Service Control & Flexibility



Service Tools

Built-in routing and escalation are designed to deliver tasks to the most qualified personnel and maximize response. Service tickets can be optionally assigned to shared work queues rather than specific users. Calls can be distributed based on workload and availability for more efficient call distribution.

Product Ownership

When an item is sold, an “items owned” record is created against the account in the CRM. Serial and lot numbers are recorded against the item for rapid searching. In addition, a Device History record is maintained, displaying all components used in the master item. Within seconds, a customer can request service on an item sold, and the system is ready to help fulfill this request.

Integrated Knowledge Base

A fully integrated, intelligent Natural Language online knowledge base empowers every employee with the right answers to raise service levels and effectiveness.

Revenue Generating Opportunity

Advanced tools for establishing account-specific service level agreements, tracking milestones and managing warranty programs and renewals form an integral part of the service functionality. The ability to view and track response times and escalation patterns and the multiple billing options provide control over revenue generating opportunities.

Complete Customer Service

The Service Department dashboard provides the means for establishing account-specific service level agreements, service tickets, defect tracking and warranty program tracking.

- ❖ Establish user-defined service level agreements per each account
- ❖ Affiliate and track user-defined warranty programs for inventoried items
- ❖ Log and track service tickets for specific accounts related to serialized or lotted items
- ❖ Defect tracking functionality
- ❖ Track multiple parts, labor and time billing per service ticket
- ❖ Automatic billing of completed service tickets
- ❖ Create and link appointments, tasks and activities to specific service tickets
- ❖ Provide canned notes containing boilerplate text to speed up the capture process
- ❖ Unlimited user-defined fields/forms/folders can be linked to each service ticket
- ❖ Maintain a complete history of activities with unlimited notes about each service ticket
- ❖ Populate and utilize the Natural Language online knowledge base to search for problem resolutions

Managing REMOTE USERS

Executives, sales, service and field employees often operate outside the corporate office. To accommodate this, CRM for SYSPRO provides a number of remote access capabilities.

Microsoft Outlook Integration

Contacts, appointments and emails are integrated into Microsoft Outlook in real-time. Bi-directional synchronization facilitates ease-of-use and remote access to data.

Remote Synchronization

Users can work on laptop computers off-line on an airplane, at a hotel or even at a customer site, since CRM for SYSPRO features remote, bi-directional synchronization. Periodically, when needed, these users can synchronize their data to the home location data via a LAN, WAN or VPN over the Internet.

Reporting and Metrics

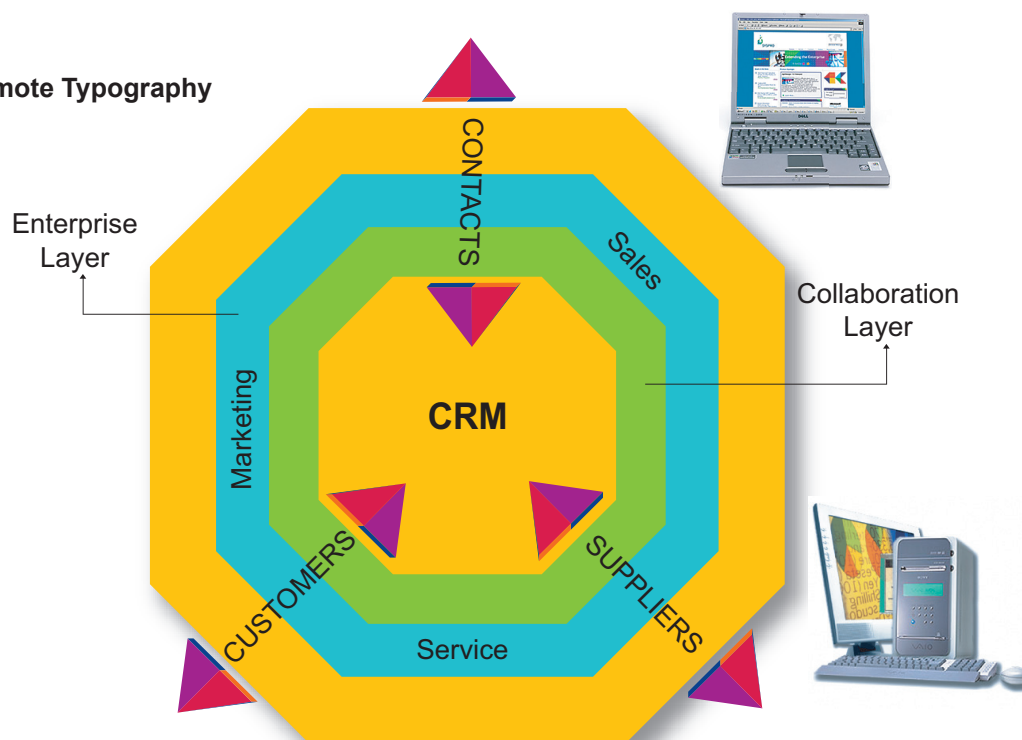
CRM for SYSPRO has exceptional analytics and reporting functionality. The system includes a powerful easy to use data query engine and an extensive

report writer with output to Microsoft Excel, as well as incorporating external analysis and reporting tools. Users also have the ability to perform one-click copying of views to Microsoft Excel. Reports are user defined and can access all system and user defined fields.

Empowering CRM Strategy

CRM for SYSPRO is a critical link in enabling and empowering a true extended enterprise strategy. The 360° view of all contact touchpoints coupled with the strategic advantage of an integrated solution deliver tangible, intrinsic and bottom line value to the enterprise.

CRM Remote Typography





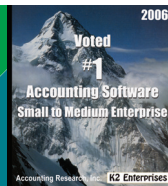
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GOLD CERTIFIED
Partner



*"VOTED
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Company"*



*"VOTED
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Company
of the Year"*



*"VOTED
best
Accounting
Software"*



FINALIST
2005 / 2007



WINNER
2004

Software Industry Awards
"Software Company of the Year"
SOFTWARE COUNCIL OF SOUTHERN CALIFORNIA



*"VOTED
best
Implementation
Methodology"*



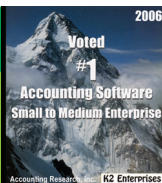
*"Best
VAR
Program
Award"*



*"Ae4
Company
Finalist
2007"*



*"CRM
Software
Award"*



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