

# CRM for SYSPRO

## Product Brief

### Comprehensive CRM—Sales to Service

Experience a web-based, mobile-friendly CRM application and access your business critical sales, marketing and customer service information with ease.

CRM for SYSPRO is a feature-rich, enterprise-class solution that allows customers to strengthen relationships across the entire supply chain. The solution provides access on the go through mobile responsive forms or from a standard browser. The 360° view of each relationship, including related ERP data from SYSPRO, is available in an easy-to-use format with customizable grids and views.

#### CRM for SYSPRO

- Empowers users to collect and analyze business data from multiple sources to enhance relationships, reporting and decision making
- Provides the foundation for a customer-based strategy to increase revenues, profitability and maximize ROI
- Allows ownership of data stored at each contact touch point so data-driven management decisions can be made throughout the sales process
- Facilitates the organization, automation and synchronization of business processes to improve operations, sales, marketing and customer service
- Lets companies easily mold CRM for SYSPRO to their specific needs through drag and drop updates to the UI or by extending the product functionality through the module builder
- Provides the flexibility of cloud or on-premise deployment options for additional flexibility to meet the organization's IT requirements and operational budgets

#### Product

- Extend beyond salesforce automation to a full 360° view of customers
- Real-time integration with SYSPRO ERP for a complete view of each relationship
- Fully web-based and modern UI built on .net platform

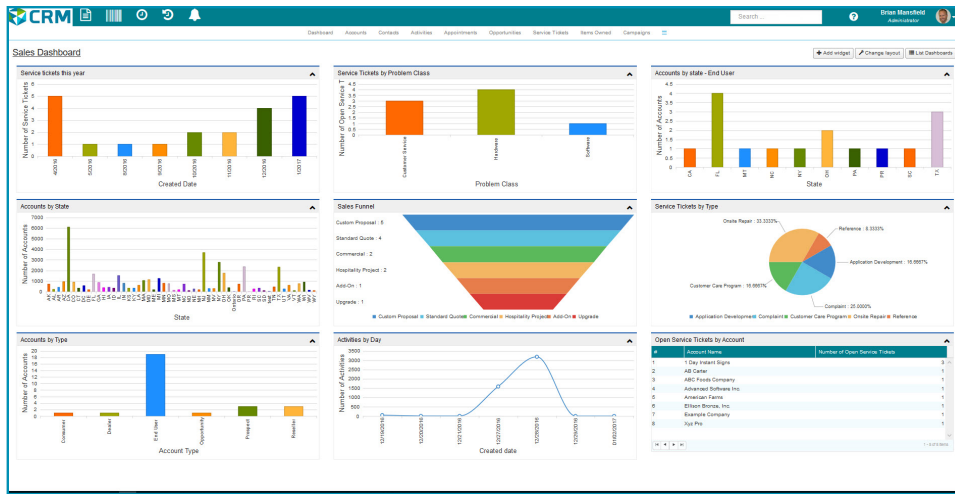
#### Features

- Easy to use, streamlined UI and navigation
- Robust module builder that makes integration with customization quick and simple for any size organization
- Protect data from unauthorized access with a robust security model

#### Benefits

- Ability to quickly adapt the software to your specific business processes
- Choice—one of the only CRM solutions offering on-premise deployment in addition to cloud
- Access anywhere—get real-time data from any mobile platform

# CRM for SYSPRO



## Data is Key

Create and drill into dashboard widgets displaying key information from CRM modules. Role and user specific dashboards allow your users to focus on the areas that matter most to them. View opportunity pipelines, leads from a recent trade show, or a list of open appointments for the day.

## CRM for SYSPRO Features:

- Protect data from unauthorized access with a robust security model
- Define unlimited number of custom fields, grids, views, and forms by user or role
- Easily find data using extensive search and filtering capabilities including global, grid, view or column based lookups
- Quick ROI with rapid implementation and training
- Implement local or server based workflow processes to automate routine business requirements
- Leverage social media with support for LinkedIn, Facebook, Google+ and others
- Integrate with other systems with quick launch capability and extensive API call support
- Save time with easy-to-use data conversion and migration tools

## Integration with SYSPRO:

- Integrates with Accounts Receivable, Accounts Payable, Sales Orders, Invoice, Quotations, Inventory, and RMA modules
- Convert prospects to customers or suppliers in SYSPRO directly from CRM
- Real-time, bidirectional synchronization of integrated records and field data
- Produce quotes and purchase orders to facilitate the buying and selling processes
- Create SYSPRO sales orders directly from CRM
- View accounting activities in CRM as part of the historic activity trail
- Automatic update of serialized items owned history as customers are invoiced

# CRM for SYSPRO

## Sales Features:

- Manage sales opportunities to break down your pipeline
- Maintain a complete history of activities with unlimited notes and document attachments
- Create and link appointments, tasks and activities with bidirectional Outlook Integration
- Track key sales milestones
- Analyze competitors, buying issues, and project trends
- Print sales proposals or quotes using a mail merge template



## Service Features:

- Log and track service tickets related to serial or lot traceable items
- Affiliate and track warranty programs for inventoried items
- Route and escalate service tickets automatically based on user-defined rules
- Maintain a complete history of the customer service interactions with the client
- Populate and utilize the natural language knowledge base
- Perform extensive searches for problem resolution and similar tickets

## Marketing Features:

- Establish campaign records to track trade shows, targeted emails, or print advertising
- Define the tasks within your marketing team and centrally monitor to completion
- Track estimated budgets and actual expenses to generate ROI and cost reporting
- Link account responses, lead generation, and won/loss sale values
- Illustrate real-time profitability analysis
- Execute targeted email blasts and direct mailings

## About SYSPRO

SYSPRO is a global, independent provider of industry-built ERP software designed to simplify business complexity for manufacturers and distributors. Focused on delivering optimized performance and complete business visibility, the SYSPRO solution is highly scalable, and can be deployed on-premise, in the cloud, or accessed via a mobile device. SYSPRO's strengths lie in a simplified approach to technology, expertise in a range of industries, and a commitment to future-proofing customer and partner success.

SYSPRO has more than 15,000 licensed companies in over 60 countries across six continents.

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