Contact Management

SOLUTION FACTSHEET

SYSPRO Contact Management allows you to defi ne and manage a rich set of information about the people with whom you do business, as well as the individuals within your organization.

It helps manage information, not only about traditional SYSPRO customers and suppliers, but also other business relationships such as potential customers (prospects), consultants and competitors. Visibility of the communications (or activities) that occur between the touch-points of organizations facilitates proactive intervention by management, improves relationships and eliminates duplication of efforts. Contact Management allows for multiple contacts to be assigned to customers, suppliers and accounts (e.g. organizations or people that are not customers or suppliers). Activities (e.g. details regarding interactions with these contacts such as phone calls, emails and visits) are stored against the contact.

Integration with Microsoft® Outlook® allows email correspondence to be sent and updated as an activity within the Contact Management system. The contact address information is stored in a structured format allowing integration to Microsoft MapPoint. SYSPRO provides a free utility that allows users of Microsoft Office® XP and Microsoft Office 2007 to interact with the contact management d ata , reg a rd l es s of whether they use SYSPRO or have it loaded on their workstation. This allows virtually everyone in your organization to have access to the contact management data.

The Benefits of Contact Management

- Recording, planning and tracking activities against contacts in a centralized environment
- Improved customer and supplier service through instant on-screen access to all relevant information, including touch-points with your company
- Powerful customizable search and query capabilities
- Integration with Microsoft Outlook for sending and receiving email
- Integration with Microsoft Offi ce for enterprisewide use of SYSPRO Contact Management information
- Structured addresses for enhanced location support
- Licensed per Contact Management user, not per SYSPRO user.

Contact Management Features

- Create contact categories
- Create extensive contact information
- Configure user fields to enable capturing of additional data when posting an activity
- Post and track contact activities
- Create SYSPRO suppliers and customers from a contact account
- Define dynamic organization lists Optionally synchronize contacts to Microsoft Outlook

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Product Version:

SYSPRO 8

Related Modules:

- Accounts Payable
- Accounts Receiveable

Sectors:

Manufacturing and Distribution

Industries:

- Automotive Parts and Accessories
- Electronics
- Fabricated Metals
- Food and Beverage
- Industrial Equipment and Machinery
- Packaging
- Plastics and Rubber

Technical Requirements:

- Microsoft .NET Framework 4.6
- SYSPRO 8 Service Upgrade Manager
- SYSPRO 8 Avanti Initialization Service
- Internet Information Services (IIS) 7.0 World Wide Web Publishing Feature

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