



The Competitive Edge Since 1986.



## SYSPRO Customer Relationship Management (CRM)

Do you wish to extend the benefits of the SYSPRO enterprise system by supplying all the key components of customer and vendor management in a single module that seamlessly integrates back office accounting and ERP functionality, as well as Microsoft® front office programs?

### The Value of SYSPRO CRM

The conventional approach to CRM software is to assemble CRM solutions in pieces. Virtually all CRM programs consist of different modules, such as marketing, sales and service, that are used by different departments to track the same customer. In consideration of all of the other software that tracks critical customer information, such as accounting, ERP systems, websites and email, it is evident that the piecemeal approach to CRM just adds to the complexity of business software solutions.

SYSPRO CRM challenges this piecemeal approach to CRM. The solution is designed to offer all of the key components of business management in one simple module that can be acquired inexpensively and implemented quickly. By employing a powerful set of collaboration tools, SYSPRO CRM puts people at the center of the enterprise, while linking all other business activities (marketing, sales, service, fulfillment and accounting) and important business data (SYSPRO accounting transactions, Microsoft Office® documents and Outlook™ emails) back to the people.

SYSPRO CRM allows everyone to share the same data while using similar screens to track revenue-generating campaigns, opportunities and services provided to customers. It has the look and feel of a single program, not a complex collection of many different pieces of software, resulting in a CRM system that will actually get used.

- ▶ Enterprise-class CRM functionality that's easy to use and affordable
- ▶ One module to support sales, marketing, service, fulfillment and accounting
- ▶ Real-time integration to SYSPRO Version 4.0 and higher
- ▶ Extensive customization capabilities without programming or a DBA
- ▶ Complete implementation and training in days, not months

### CRM Design Philosophy

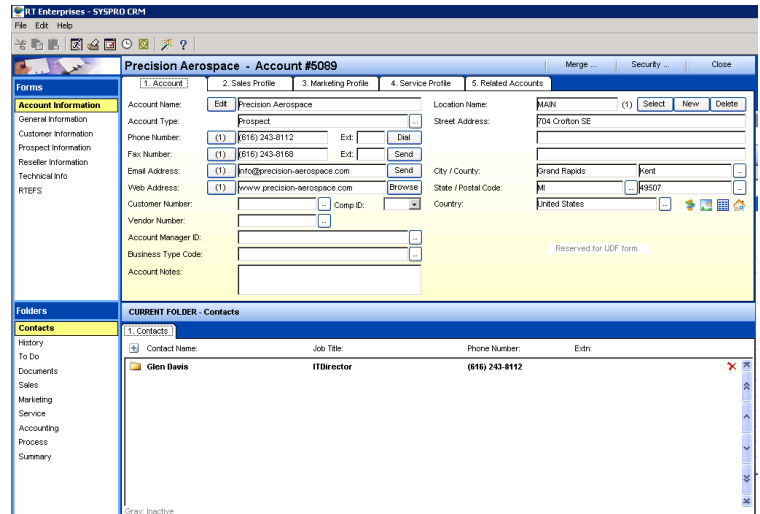
By eliminating extensive menu commands and employing an intuitive, customizable "Dashboard" design, SYSPRO CRM achieves a surprisingly simple user interface while delivering unsurpassed interdepartmental integration.

The SYSPRO CRM Dashboard is organized into three groups:

Work Center -- These are the functions that all employees will probably want to use. Collectively, these make up the heart of the collaboration system that allows everyone in a company to share information and coordinate efforts related to an enterprise's most important assets: their customers.

- ▶ Calendar - displays appointments assigned to individuals for specific days or a range of days
- ▶ Tasks - displays tasks that have been assigned by the user or by others to the user
- ▶ Accounts - displays accounts assigned to the user, or all accounts based on an individual's rights
- ▶ History - displays a history of past activities to help analyze personal workflow or company productivity

Departments -- These are the functions that will be useful to certain users based on their role in a company. Collectively, these functions provide Customer Relationship Management (CRM) capabilities that are normally



sold as separate modules with traditional CRM products.

- ▶ Marketing - displays open and/or closed marketing campaigns in list or graphical views
- ▶ Sales - displays pending and/or won/lost sale opportunities in list or graphical views
- ▶ Fulfillment - displays all sent and/or unsent mail requests in list views

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### CRM Design Philosophy, cont.

**System Manager** -- These are administrative functions that would typically be used by a departmental manager or a system administrator. The System Manager simplifies the most complex setup functions through the use of intuitive tables, menus and dialog boxes.

- ▶ Tools - displays a selection of tools for database management and system administration
- ▶ Setup - displays a highly organized list of setup choices with access to extensive configuration tables

### Targeted Mass Marketing - Finding New Customers First

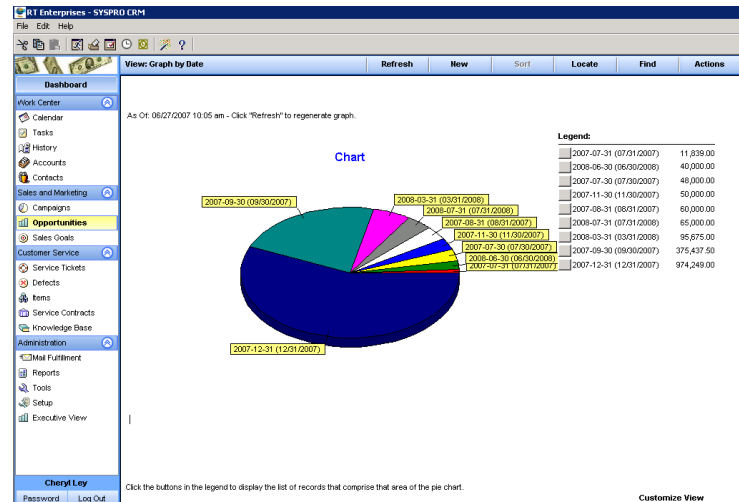
Designed for marketing professionals, the Marketing Department View provides the facilities and tools for establishing, executing, tracking and reporting the success of any marketing-related campaign.

### Marketing Features in SYSPRO CRM

- ▶ Establishes campaign records for unlimited user-defined campaign types
- ▶ Adds unlimited user-defined fields/forms/folders to each campaign record
- ▶ Creates and links appointments, tasks and activities to specific campaigns
- ▶ Attaches unlimited documents of various document types to each campaign
- ▶ Tracks estimated budgets and actual expenses related to each campaign
- ▶ Executes email, fax broadcasts and direct mailing within each campaign
- ▶ Links account responses and opportunities resulting from specific campaigns
- ▶ Generates revenue forecasts and illustrates real-time profitability analysis per campaign

### Advanced Sales Automation - Helping Convince Customers to Buy

Designed for sales professionals, the Sales Department View provides the facilities and tools for maintaining information about accounts, contacts and the opportunities that result from a company's relationship with them.



### Sales Features in SYSPRO CRM

- ▶ Manages sales opportunities by creating and linking opportunity records to specific amounts
- ▶ Adds unlimited user-defined fields/forms/folders to each opportunity record
- ▶ Maintains a complete history of activities with unlimited notes about each opportunity
- ▶ Creates and links appointments, tasks and activities to specific sales opportunities
- ▶ Executes graphical sales pipeline reports in real-time based on user-defined metrics
- ▶ Tracks key sales milestones by utilizing sophisticated sales process management features
- ▶ Analyzes competitors, buying issues and project trends using the competitor knowledge base
- ▶ Produces sales expense and win/loss analyses through extensive reporting capabilities

### Complete Customer Service - Helping Keep Customers Happy

Designed for service professionals, the Service Department View provides the facilities and tools for establishing account-specific Service Level Agreements (SLA), service tickets and warranty program tracking.



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### Service Features in SYSPRO CRM

- ▶ Establishes user-defined Service Level Agreements per each account
- ▶ Affiliates and tracks user-defined warranty programs for inventoried items
- ▶ Logs and tracks service tickets for specific accounts related to serialized or lotted items
- ▶ Routes and escalates reported service tickets automatically based on user-defined rules
- ▶ Creates and links appointments, tasks and activities to specific service tickets
- ▶ Adds unlimited user-defined fields/forms/folders to each service ticket
- ▶ Maintains a complete history of activities with unlimited notes about each service ticket
- ▶ Populates and utilizes the natural language knowledge base to search for problem resolutions

### Real-Time Accounting Integration - Ensuring Profitability

SYSPRO CRM's unprecedented real-time front to back office integration has the facilities and tools for providing customers and vendors with accounting-related CRM functionality from a single application.

### Accounting Features in SYSPRO CRM

- ▶ Combines prospects with SYSPRO customers and vendors in the same CRM database
- ▶ Converts prospects to customers and accounts to vendors directly from SYSPRO CRM
- ▶ Synchronizes accounts, contacts, phone numbers, bill-to and ship-to addresses
- ▶ Queries the SYSPRO accounting database from the CRM account screen in real-time
- ▶ Produces quotation and purchase order entries in real-time directly from SYSPRO CRM
- ▶ Creates SYSPRO sales orders directly from the synchronized CRM account record
- ▶ Views accounting activities directly from account records within SYSPRO CRM
- ▶ Rights-based, field and screen-level security on accounting functions are accessed by SYSPRO CRM

### Other Key CRM Features include:

- ▶ Fulfillment - a full-featured literature inventory and mail request management system
- ▶ Reporting - a comprehensive built-in report writer for generating or executing internal and external reports

### Additional "Portal" Features Under Development

- ▶ Web Portal - for providing customer self-service, capturing leads and generating automated responses
- ▶ Email Portal - for automatically capturing or recording email-based service requests and sales opportunities
- ▶ Telephone Portal - for providing automatic outbound dialing and screen pops for outbound calling

### Minimum System Requirements/Recommendations

- ▶ Display:XGA (1024x768)
- ▶ CPU:Pentium II or higher (recommended)
- ▶ O/S:Windows NT/2000/9x (client and server)
- ▶ HD:100MB (server), 2MB (client)
- ▶ RAM:64MB or higher (recommended)
- ▶ DBMS:Native support for MS-SQL server and Pervasive SQL 2000