

crm-now/PS

Cloud-Based Customer Relationship Management System (CRM)

crm-now's hosted CRM is ideal for small and medium sized businesses that require tools to improve their sales processes, opportunity tracking, and customer satisfaction but don't have the resources or IT infrastructure for an in-house CRM solution.

Closing new business opportunities seem to take forever. How do you track information and activities through the entire sales cycle and ultimately successful delivery of your products and services? What can help when key employees leave and take the history of a project with them?



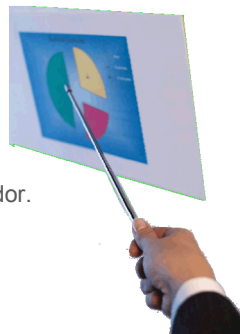
- ▶ Improve productivity with world-wide access to vital customer, partner, and prospect information
- ▶ Build long-lasting customer loyalty, improve customers' experiences, and generate more repeat sales
- ▶ Measure your company's key performance indicators

Improve Your Sales Process

- ▶ Capture leads directly from your web site. Track leads all the way through the sales cycle
- ▶ Track accounts, contacts, opportunities, quotes, and activities
- ▶ Attach customer-specific documents to accounts for easy access
- ▶ Analyze customers' purchase histories for up-sell and cross-sell opportunities
- ▶ Create multiple price books of your products and services (with different prices based on market segment)
- ▶ Generate PDF sales quotes and email them from within the CRM system

Manage Marketing Campaigns

- ▶ Measure marketing campaign effectiveness based on actual results
- ▶ Import information directly from trade show lead capture files.
- ▶ Manage mailing lists based on data related to leads, accounts, and contacts
- ▶ Execute personalized email marketing campaigns directly from your CRM system — no need to hire an outside email marketing vendor.



Improve Supply Chain Management

- ▶ Use the built-in supply chain management features. For companies that do not have (or need) a full Material Requirement Planning (MRP) system,
- ▶ Maintain and provide access to your approved vendor list
- ▶ Streamline your procurement and fulfillment processes by using an integrated approach
- ▶ Manage up-to-date stock position by integration between order fulfillment and available stock in your warehouse
- ▶ Generate purchase orders and email them directly to your vendors from within the CRM system

Provide Better Customer Care



- ▶ Link trouble tickets and contract requirements to insure support personnel understand service terms
- ▶ Assign trouble tickets and RMA requests to appropriate support staff
- ▶ Update customers on the status of trouble tickets through email
- ▶ Create a knowledge base of troubleshooting information
- ▶ Automate customer support escalation procedures
- ▶ Enable web-based self-service allowing customers to report problems, request RMA's, and track trouble tickets

Tailor Security Features to Requirements

- ▶ Insure access to the information employees need – and only the information they need
- ▶ Add or delete logins at any time—your system administrator has control over system access
- ▶ Grant access to only those features your staff needs to use to accomplish their goals
- ▶ Apply security filters to decide who can view, edit, and delete specific information
- ▶ Create hierarchical roles-based security profiles that match your organizational structure

Customize the System to Meet your Needs

- ▶ Turn off features your organization doesn't need (You can always turn them on later)
- ▶ Add fields to track information important to your business
- ▶ View and filter information in layouts that make your team their most productive

Do More and Become Even More Productive

- ▶ Use the integrated calendaring and task lists to enhance team collaboration.
- ▶ Import data from 3rd-party tools such as ACT[®] and Goldmine[®]
- ▶ Export data to spreadsheet software, such as Microsoft[®] Excel[®] for further analysis
- ▶ Automate process workflows
- ▶ Integrate with 3rd-party tools such as Outlook[®] and Thunderbird
- ▶ Use dashboards to provide management with an overview of the key business metrics.
- ▶ Trust crm-now[™]: crm-now/PS is based on Open Source, keeping you independent and making this non-proprietary software easily extensible.



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