

Customer Relationship
Management
CRM



SYSPRO CRM

SYSPRO's dynamic Customer Relationship Management (CRM) and Supplier Relationship Management (SRM) functionalities provide companies with the leverage necessary to perform in the most competitive environments. SYSPRO CRM is a comprehensive software solution that puts the customer at the epicenter of the business. By empowering companies to capture, analyze and utilize data to enhance customer relationships, the system becomes the foundation of a customer-based strategy to increase revenues, profitability and maximize performance. SYSPRO provides integrated solutions addressing all the areas of the extended enterprise: Enterprise Resource Planning (ERP), Warehouse Management and Advanced Planning and Scheduling (APS), E-Commerce.

360° View

CRM fully integrates with the other areas of SYSPRO software to give a company the power of an extended enterprise solution that delivers a dynamic 360° view of each customer, supplier and partner 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.

Increased Loyalty & Value

SYSPRO CRM 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.

CRM Environment



Total Visibility

The system incorporates key areas that include contact management, sales, marketing, service and fulfillment. CRM 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.

Managing Customer Touch Points

SYSPRO CRM 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 inefficient data duplication. The result is factual support for key management decision-making functions.

Comprehensive Features - Functional Capabilities

Outstanding CRM System

SYSPRO CRM 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 wireless web access 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 & 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



Web and Wireless Access **Available 2004*

Data will be accessible from anywhere using web-enabled technologies and Wireless PDAs (Personal Data Assistants.)

Flexible Customization

Easy customization of CRM software enables:

- Unlimited user-defined fields & configurable templates
- Choice of MS SQL Server or Pervasive SQL back-end
- Creation of user-defined forms, folders & 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
- Speeding up the design of company specific templates with Rapid Application Development & Deployment (RADD) technology

Developer's Tool Kit

This powerful table-based technology permits users to create custom tables, forms, queries, reports and batch processes using a completely code-free environment

Scalable

SYSPRO CRM 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 Sales

SYSPRO CRM provides visual monitoring of the details and progress of pending 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 SYSPRO CRM database. Forecasting time, outbound calls and customer contact rates are increased, resulting in increased 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 appears automatically in a CRM query 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.

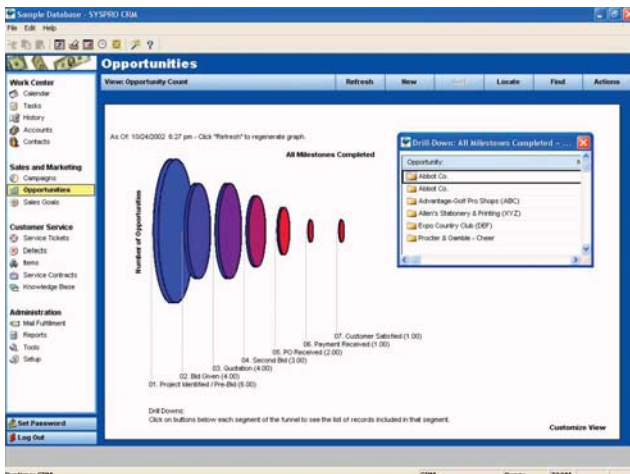
Total Collaboration

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

Dynamic Sales Management

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

- Manages sales opportunities by creating and linking opportunity records to specific accounts
- Sales goals tracking with drill down by region & month
- Multiple currency support
- Automatic creation of sales opportunities
- 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 real-time, graphical sales pipeline reports based on user-defined metrics
- Tracks key sales milestones by utilizing sophisticated sales process management features
- Analyzes competitors, buying issues and predicts trends using the competitor knowledge base
- Produces sales expense and win/loss analyses through extensive reporting capabilities



Sales Pipeline Analysis with complete detailed drill-down functionality.

Managing Marketing

SYSPRO CRM 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.

Focused Marketing Execution

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

- Establishes 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
- Tracks estimated budgets and actual expenses related to each campaign
- Executes e-mail, fax broadcasts and direct mailings within each campaign
- Links account responses and opportunities resulting from specific campaigns

Managing Service

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



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. The system also includes a web-based service portal delivering a true customer self-service and field service solution.

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 Opportunities

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

- 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
- Defect tracking functionality
- Tracking of multiple parts, labor and time billing per service ticket
- Web-based service portal
- Automatic billing of completed service tickets
- Creates and links appointments, tasks and activities to specific service tickets
- Provides canned notes containing boilerplate text to speed up the capture process
- Unlimited user-defined fields/forms/folders can be linked 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

Managing Remote Users

Executives, sales, service and field employees often operate outside the corporate office. To accommodate this, SYSPRO CRM provides a number of remote access capabilities. The “Road Warrior” layer augments the Enterprise and Collaboration layers, giving remote users real-time access to manage customer and contact interactions.

Microsoft Outlook Integration

Contact, appointments and e-mails are integrated into Microsoft Outlook in real-time. Bi-directional synchronization facilitates ease-of-use and remote access to data. This integration also makes possible the backward synchronization of data into PDAs, such as the Palm and Pocket PC.

Remote Synchronization

Users can work on laptop computers off-line on an airplane, at a hotel or even at a customer site, since SYSPRO CRM 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.

Marketing Portal

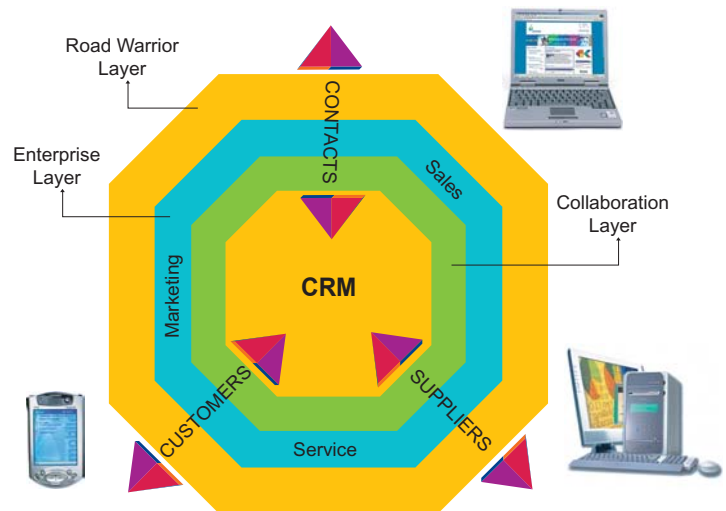
Web-based lead capture is automated and managed through the Marketing Portal. When a prospect enters details on a web site, the information is automatically integrated into the CRM system. This feature removes duplicate data input and assists in increasing prospect qualification and service levels. SYSPRO offers capabilities, such as automated reply emails, to speed response to information captured through the Marketing Portal.

24/7 Service Portal

The Service Portal facilitates 24/7 Internet-based customer services. To increase service levels, customers can interact with the CRM system on a real-time basis by:

- Creating new service tickets
- Checking on the status of existing service tickets
- Sharing information about service tickets in a simple, efficient and cost-effective manner
- Selecting portions of the Natural Language knowledge base which can be published to the web, giving customers a self-service facility to search and find solutions to common problems

CRM Remote Typology



Reporting and Metrics

SYSPRO CRM 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

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



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