

## Systems Overview

The system of choice for SME and small corporate users. ProspectSoft CRM offers mobility of use, close accounts integration and flexibility in its application.

**ProspectSoft CRM** with its modular structure has enabled widely different types and sizes of organisation to benefit from great improvements in customer intelligence. This intelligence is available to traditional CRM users like sales and marketing departments, and to customer helpdesks and field service staff. It is also accessible to less obvious departmental users such as supplier management and sales order entry.

**ProspectSoft CRM** runs on local or wide-area networks and on most portable computers, PDA's and mobile telephones.

**ProspectSoft CRM** – developed in co-operation with Intel for the ultimate mobile experience.



### Mobility of Use

Our co-operation with Intel® on developments for the Centrino® microprocessor and with other major IT and telecommunications companies, puts us at the forefront of today's mobile environment.

The result is that ProspectSoft CRM users can access and process information anywhere, anytime and on any device, such as laptop or tablet PC, PDA or mobile phone, over multiple communication networks.

Consequently, through a single window, users can: create sales leads, log customer problems, review documents or e-mails, access accounting information, produce quotations or enter orders, even while on the road. This is incomparable mobility for a CRM system.



### Accounts Integration

ProspectSoft CRM integrates closely with most popular accounting systems. Uniquely, full integration is available to both office-based and mobile users.

**The main points of integration are:** Sales & Purchase Ledgers, so customer and supplier data can be accessed and processed.

Stock and prices, for viewing in the CRM system and to produce quotations in Word, Excel or Outlook.

Sales Order Processing, to convert ProspectSoft CRM quotations and for direct order entry.

### Flexibility

Many areas of ProspectSoft CRM can be tailored easily to meet the needs of individual users, while data within the system can be analysed and reported on in an almost unlimited number of ways.

Not only is integration with accounting systems available, but also with manufacturing, logistics, and many other 'back-office' applications.

With this flexible approach, ProspectSoft CRM supports businesses in industries as diverse as audio systems, construction, medical instruments, industrial cleaning services, office consumables and glassware manufacture.

### Key Features

- Configurable for many sizes and types of organisation with multiple functional modules
- Fully scalable from entry-level to enterprise-wide solution
- Sales force, marketing and field service automation, all with management escalation
- Dynamic integration with Microsoft Office giving full document management
- B2B and/or B2C customer relationship management within one system
- Dynamic analysis and detailed management reporting on customers and suppliers, sales, service or products

## Modularity

ProspectSoft CRM offers on-screen areas that can be tailored, such as field names, descriptions, activity sequences and tabs. The system can also be configured for specific industries and business activities by implementing individual system modules.

Modules can be included with the initial installation, or can be added as a user's operational needs evolve.

A brief outline of each module is listed here. However, in-depth explanations are provided in our 'Module Overview'.



## Optional System Modules

### B2B & B2C Contact Manager

Maintain business or consumer records, or even both, within the same CRM system

### Sales Lead Tracker

Manage individual sales opportunities across multiple contacts

### Document Manager

Produce and file Word and Excel letters or faxes and Outlook e-mails; import any OLE-compatible document

### Telephony Integration

Manage in and outbound calls to and from switchboard, DDI and mobile numbers

### Sales Ledger Integration

View details of transactions through ProspectSoft CRM in real-time, in the office or on the road

### Sales History

Review customer purchases in the office or on the road: view purchase ledger information in real time

### Purchase Ledger Integration

View purchase ledger details in real-time, in the office or on the road

### Purchase History

Review suppliers, products, quantities, prices

### Products and Pricing

Access and use stock and price data from accounts system

### Quotation Engine

Using data from accounts systems, produce quotations in Word or Excel templates

### Sales Order Processing

Enter orders or convert ProspectSoft CRM quotations into accounts system SOP

### Problem Tracker

Log, track and analyse pre- or post-sales problems by customer and/or contact

### Infobase Searching

Build a knowledge-base for rapid resolution of customer problems

### Problems Analysis Matrix

Log problems rapidly in structured form by call-centre or help desk with detailed analysis

### Service Contracts

Manage maintained equipment by serial number, contract type and period

### Advanced Relationships

Link all interested parties, wherever located, to any activity or project

### Report Writer and Toolkit

Analyse and report on every field in the ProspectSoft CRM database

### Automatic Alerts

Escalate and notify users proactively about critical business conditions

### Screen Customiser

Tailor individual screens and data fields

### Real-time Data Tunnel

Integrate and analyse external databases without need for programming skills

### XML API (Application Program Interface)

Integrate ProspectSoft CRM with many other software applications e.g. retailing, CAD

### SOAP/.Net API

Integrate ProspectSoft CRM with other (remote) applications over the Internet

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