



EnterpriseIQ Customer Relationship Management

Combining ERP, Sales, Marketing and Customer Service

Manage your Prospect, Customer and Supplier Relations

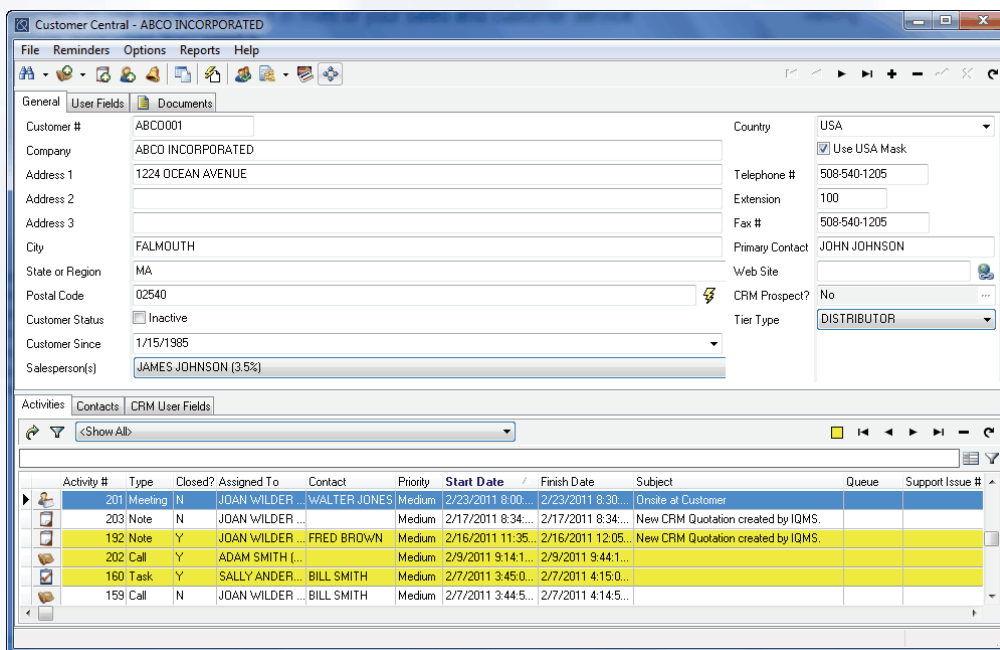
The EnterpriseIQ Customer Relationship Management (CRM) program provides your employees with the information and tools they need to deliver an exceptional customer and supplier experience. Whether it is Sales, Marketing or Customer Service, CRM allows you to optimize the time spent on developing and maintaining successful relationships and maximizing opportunities.

Because CRM is embedded into the EnterpriseIQ ERP system, there is no redundant data entry and CRM supports complete access to all ERP related data. CRM allows you to catalog information from initial marketing campaigns and sales contacts through quoting, customer orders, production, shipping, invoicing, payment and RMA cycles. CRM enables you to capture, manage and track every interaction with customers and suppliers in one place — putting everything in front of your sales and customer service people right when they need it.

BENEFITS

- Track the entire customer and supplier business relationship in a single centralized view
- Proactively manage customer needs and opportunities
- Increase customer service levels
- Gain an overall view of sales and support activities
- Automate routine and repetitive tasks such as mass mailings
- Single database eliminates the need for entry into multiple systems
- Attach documents to various activities for ease of access and viewing

The Customer Central screen provides multiple views of customer activity, offering one-stop access to current and historical data.



Customer Central - ABCO INCORPORATED

File Reminders Options Reports Help

General User Fields Documents

Customer # ABC0001 Country USA
 Company ABCO INCORPORATED Use USA Mask
 Address 1 1224 OCEAN AVENUE Telephone # 508-540-1205
 Address 2 Extension 100
 Address 3 Fax # 508-540-1205
 City FALMOUTH Primary Contact JOHN JOHNSON
 State or Region MA Web Site
 Postal Code 02540 CRM Prospect? No
 Customer Status Inactive Tier Type DISTRIBUTOR
 Customer Since 1/15/1985
 Salesperson(s) JAMES JOHNSON (3.5%)

Activities Contacts CRM User Fields

Activity #	Type	Closed?	Assigned To	Contact	Priority	Start Date	Finish Date	Subject	Queue	Support Issue #
201	Meeting	N	JQAN WILDER...	WALTER JONES	Medium	2/23/2011 8:00:...	2/23/2011 8:30:...	Onsite at Customer		
203	Note	N	JQAN WILDER...		Medium	2/17/2011 8:34:...	2/17/2011 8:34:...	New CRM Quotation created by IQMS.		
192	Note	Y	JQAN WILDER...	FRED BROWN	Medium	2/16/2011 11:35:...	2/16/2011 12:05:...	New CRM Quotation created by IQMS.		
202	Call	Y	ADAM SMITH L...		Medium	2/9/2011 9:14:1...	2/9/2011 9:44:1...			
160	Task	Y	SALLY ANDER...	BILL SMITH	Medium	2/7/2011 3:45:0...	2/7/2011 4:15:0...			
159	Call	N	JQAN WILDER...	BILL SMITH	Medium	2/7/2011 3:44:5...	2/7/2011 4:14:5...			

"With the tools developed by IQMS, it is much easier to access helpful information and maintain happy customers."
-Pro Charger

"CRM makes it simple to track customer information as well as enter and follow-up on sales and marketing activity."
-Apple Rubber Products

EnterpriseIQ Customer Relationship Management

Key Features

Centralize Prospect, Customer and Supplier Activities – Complete contact management system supports the tracking of all contact activities in one centralized area so current information is available to everyone.

Marketing Support – Create marketing campaigns, send mass mailings (printed or email), create mail merges, track the success and manage the costs of your marketing and advertising campaigns.

Quick Activity Summary – See a snapshot view of prospects, customers and suppliers including contact information, credit status, documents, user defined data and all associated events.

Calendar and Activity Scheduling – All employee events are added automatically to a calendar to make it easier to view employee schedules and create meetings when everyone is available.

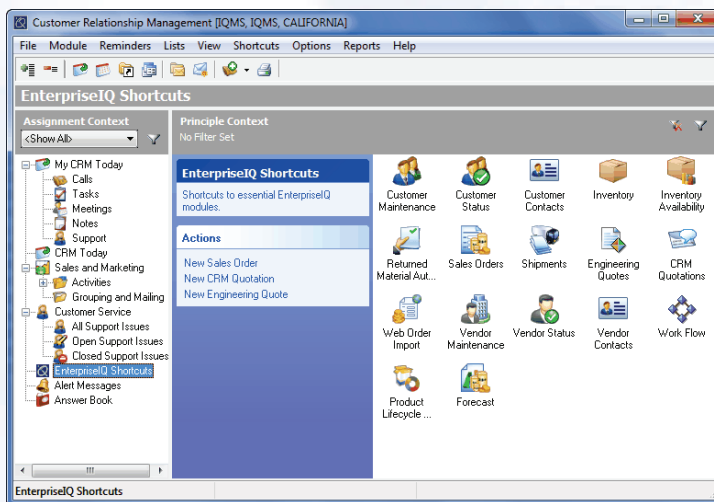
Alert Messages – Set automatic alerts for customers, suppliers or contacts and pop-up warnings to immediately notify employees of important issues.

Direct Access to ERP Data – Link directly to all areas related to sales, marketing and customer service, including available-to-promise/capable-to-promise (ATP/CTP), order entry, quoting, credit status and more.

Issue Tracking – Efficiently track customer and supplier issues and monitor responses. CRM provides multiple hierarchical ways to group and sort issues, including automatic distribution lists, for fast and effective responses.

Answer Books – Facilitate quick and accurate customer service responses by creating customized, decision tree based answer books for common problems, employee handbooks and more.

Direct links to key ERP based data, such as sales orders, invoicing, inventory, RMA, shipments and quoting provides your sales, marketing and customer support teams with instant, accurate information.



The mobile ERP application on the BlackBerry means you always stay connected, regardless of your location.