



EnterpriseIQ Customer Relationship Management

Combining ERP, Sales, Marketing and Customer Service

Manage your Prospect, Customer and Supplier Relations

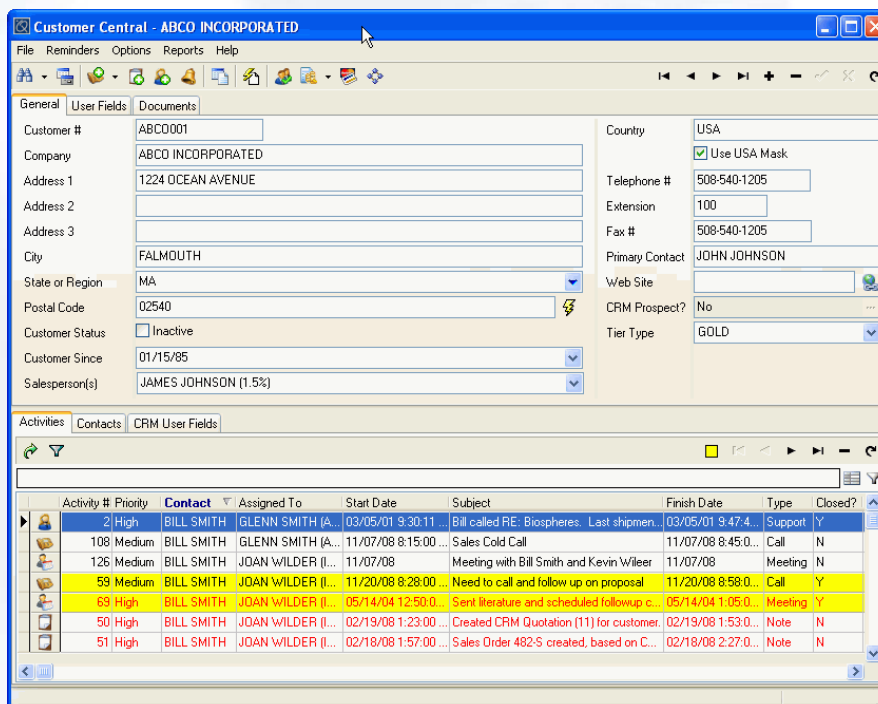
EnterpriseIQ Customer Relationship Management (CRM) provides your employees with the information and tools they need to deliver an exceptional customer and supplier experience. Whether it is Sales, Marketing or Customer Service, CRM allows you to optimize the time spent on developing and maintaining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

Because CRM is embedded into the EnterpriseIQ ERP system, there is no redundant data entry and it 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 it 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

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
 Company ABCO INCORPORATED
 Address 1 1224 OCEAN AVENUE
 Address 2
 Address 3
 City FALMOUTH
 State or Region MA
 Postal Code 02540
 Customer Status Inactive
 Customer Since 01/15/85
 Salesperson(s) JAMES JOHNSON (1.5%)

Country USA
 Use USA Mask
 Telephone # 508-540-1205
 Extension 100
 Fax # 508-540-1205
 Primary Contact JOHN JOHNSON
 Web Site
 CRM Prospect? No
 Tier Type GOLD

Activities Contacts CRM User Fields

Activity #	Priority	Contact	Assigned To	Start Date	Subject	Finish Date	Type	Closed?
2	High	BILL SMITH	GLENN SMITH (A...	03/05/01 9:30:11	Bill called RE: Biospheres. Last shipment...	03/05/01 9:47:4...	Support	Y
108	Medium	BILL SMITH	GLENN SMITH (A...	11/07/08 8:15:00	Sales Cold Call	11/07/08 8:45:0...	Call	N
126	Medium	BILL SMITH	JOAN WILDER (L...	11/07/08	Meeting with Bill Smith and Kevin Wileer	11/07/08	Meeting	N
59	Medium	BILL SMITH	JOAN WILDER (L...	11/20/08 8:28:00	Need to call and follow up on proposal	11/20/08 8:58:0...	Call	Y
69	High	BILL SMITH	JOAN WILDER (L...	05/14/04 12:50:0	Sent literature and scheduled followup c...	05/14/04 1:05:0...	Meeting	Y
50	High	BILL SMITH	JOAN WILDER (L...	02/19/08 1:23:00	Created CRM Quotation (11) for customer.	02/19/08 1:53:0...	Note	N
51	High	BILL SMITH	JOAN WILDER (L...	02/18/08 1:57:00	Sales Order 482-S created, based on C...	02/18/08 2:27:0...	Note	N

"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 snap shot 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.

