Normal CRM Activities for Sales Staff

In the e-Synergy CRM (Customer Relationship Management) application, Account Types may be Prospects, Leads, Suspects or Customers. In this listing of normal CRM activities, we make no determination of different functions for either type.

1. Account or Contact Look-Ups

2. Viewing and Editing of Account Data

3. Calendar (Viewing Callbacks and Visits)

4. To Do Listing (Letters, e-mails & faxes to be sent)

5. Enter Notes from Calls, Visits or other Contact with Accounts

6. Storage of Documents Centrally (sent, received or used internally) for Accounts, such as Word, Excel, Outlook e-mails, PDFs, Pictures, CAD drawings, etc.

7. Retrieval of Documents from e-Synergy stored to Accounts

8. Sending of Documents by e-mail and Mail – Single or Mail Merge

9. Mass Word or e-Mail Campaigns

10. Creating New Prospects, Suspects or Leads

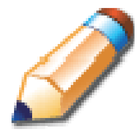
11. Creating New Contacts for Prospects, Suspects, Leads or Customers

12. With a fully integrated system, viewing of customer orders and items sold directly from the Account Card

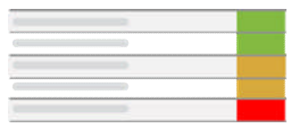
13. Reviewing Activities – What did I do? (Specific Timeframe)

14. Entering Sales Forecasts for Prospects or Customers for a Sales Pipeline

15. Entering Quotes for Prospects or Customers for a Sales Pipeline

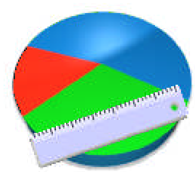


16. What does my Sales Pipeline look like?



17. Reminder of Overdue Activities

18. Marketing Campaign Projects - – Capturing Accounts, Costs and Results



19. Automatic Generation of Activities to Accounts based upon Business Rules and Events in Database

20. Awareness of New Accounts, Suppliers, Pricing, etc.

21. Awareness of Account Activities & Notes from Other Departments within Your Organization about Customers. (Late Orders, Shipping Errors, etc)