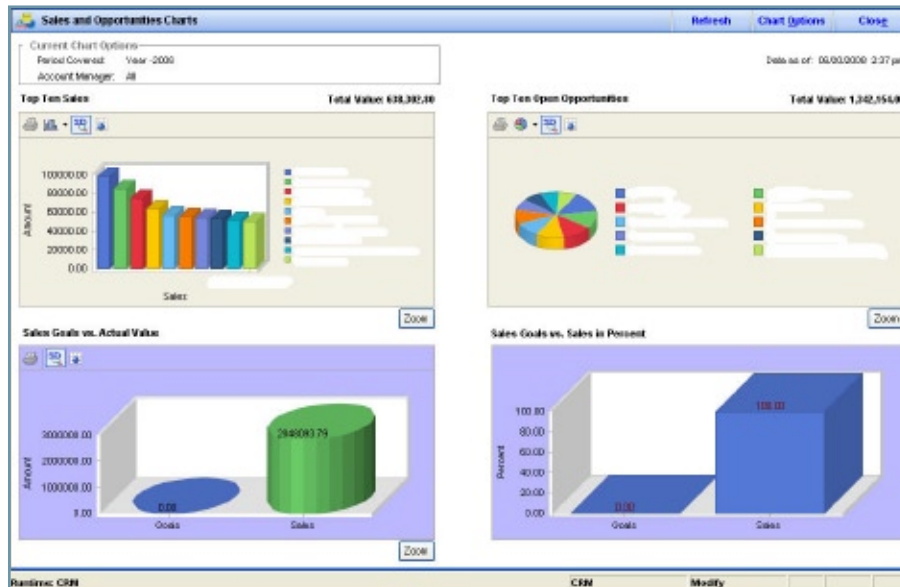# SYSPRO™

CRM for SYSPRO

Overview

To extend the benefits of the SYSPRO enterprise system by supplying all the key components of customer and supplier management in a single module that seamlessly integrates to back office accounting and ERP functionality, as well as Microsoft front office programs.

Sales Features

- Manage sale opportunities
- Create and link opportunities to specific accounts
- Define unlimited number of fields/forms/folders against opportunities
- Maintain a complete history of activities with unlimited notes
- Create and link appointments, tasks and activities
- Execute graphical sales pipeline reports in real-time based on user-defined metrics
- Track key sales milestones
- Utilize sales process management features
- Analyze competitors, buying issues and project trends
- Store knowledge base of competitor information
- Produce sales expense and win/loss analysis
- Extensive reporting capabilities

The Value of CRM for SYSPRO

- Enterprise-class functionality that is feature-rich and easy to use
- Real-time integration to SYSPRO ERP
- Extensive customization capabilities without programming
- Easily customize dashboards by user or department
- Extensive tools for administration and security
- Quick ROI with rapid implementation & training
- Implement automated processes to match business requirements
- One solution supports sales, marketing, service, fulfillment and accounting

Marketing Features

- Established campaign records for unlimited user-defined campaign types
- Define unlimited number of fields/forms/folders against campaigns
- Create and link appointments, tasks and activities
- Attach unlimited documents of various types
- Track estimated budgets and actual expenses
- Link account responses and opportunities
- Generate revenue forecast
- Illustrate real-time profitability analysis
- Execute Email or fax broadcasts and direct mailings

Service Features

- Establish user-defined Service Level Agreements per account
- Affiliate and track user-defined warranty programs for inventoried items
- Log and track service tickets for specific accounts related to serial or lot traceable items
- Route and escalate reported service tickets automatically based on user-defined rules
- Create and link appointments, tasks and activities to service tickets
- Define unlimited number of fields/forms/folders against service tickets
- Maintain a complete history per service ticket
- Populate and utilize the natural language knowledge base
- Perform extensive searches for problem resolution'

Integrated Accounting

- Combine prospects with SYSPRO customers and suppliers in the same CRM database
- Convert prospects to customers or suppliers directly from CRM
- Synchronizes accounts, contacts, phone numbers, bill-to and ship-to addresses
- Queries the SYSPRO accounting database real time from CRM
- Produce quotes and purchase orders in real time
- Create SYSPRO sales orders directly from CRM
- View accounting activities directly from account records
- Accesses rights-based, field in screen level security on accounting functions

Other Key CRM Features

- Fulfillment - a feature-rich literature inventory and mail request management system
- Reporting - a comprehensive built-in report writer for generating and executing internal and external report
- Executive view - provides graphical views of Sales and Opportunities and Service Tickets for high-level analysis

Integration

- SYSPRO CRM integrates with SYSPRO Accounts Receivable, Accounts Payable, Sales Orders and Quotation modules
- Bi-directional synchronization with MS Outlook
- Synchronize remote/off-line databases