

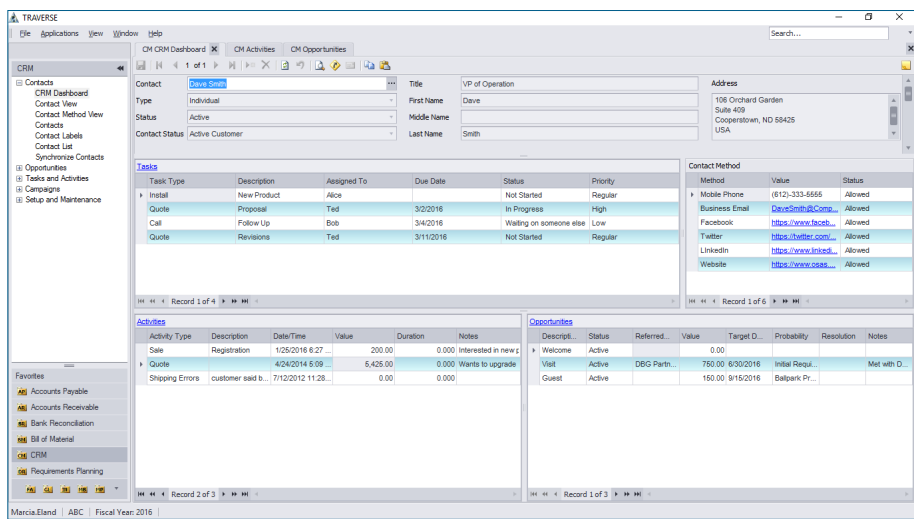


CRM

Customer Relationship Management

Sales opportunities happen anywhere and everywhere, so you need to have critical customer information at your fingertips when opportunity finds you. TRAVERGE Customer Relationship Management (CRM) gives you complete control of your customer information whether you're at your desk or miles from the office, browsing email or visiting customer sites.

No matter how your employees connect with the office, TRAVERGE CRM provides deployment options to give your team access to the information they need, tailored to fit their role. Integration to other TRAVERGE applications provides access to a wide range of information while providing the security needed to keep your data safe.



- Deploy TRAVERGE CRM on the desktop, in a browser, on mobile devices, or in Microsoft Outlook.

Take advantage of the rich sales and marketing data in your TRAVERGE system without changing programs or even screens. Easily maintain contact information and campaign data, and share it with your organization.

- Maintain unlimited contact names, methods (phone, email, fax), and user-defined fields for contacts.
- Receive, categorize, and refer opportunities, and analyze your campaigns by optionally assigning values and references.



CRM: CUSTOMER RELATIONSHIP MANAGEMENT

Contacts

- Link to TRAVERSE customers, vendors, and employees.
- Establish relationships between contacts, such as employees within a company or corporate structure.
- Import, export, and synchronize contact information.
- Access orders, history, and other information in TRAVERSE.

Activities

- Automate tracking of data activities.
- Assign label printing or bulk communication activities to contacts or campaigns.
- Create unlimited user-defined fields for activities.

Tasks

- View task lists and interactive task management screens.
- Assign task follow-up dates and actions.
- Allocate tasks to other users for activities.

Campaigns

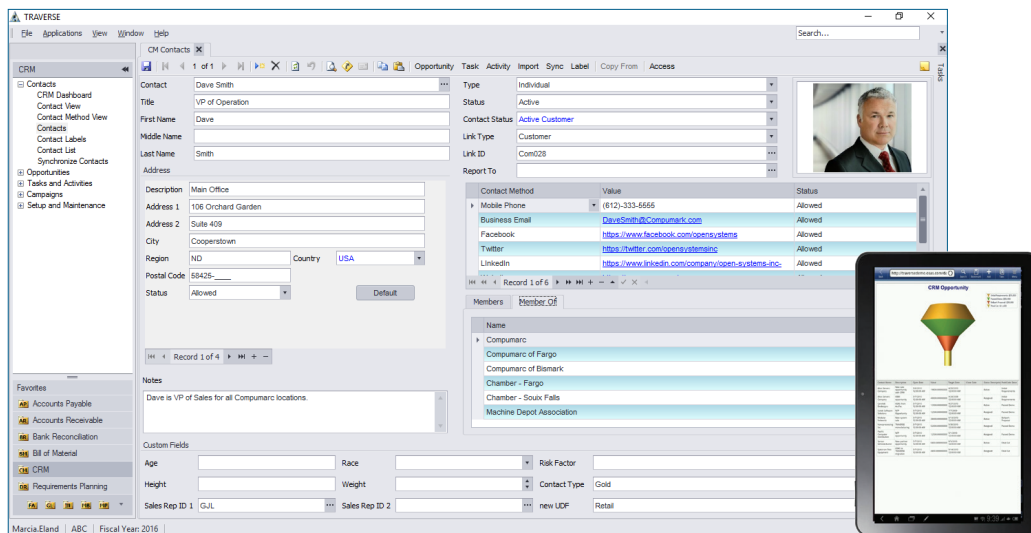
- Obtain campaign analysis reporting, including response count and value.
- Interface to TRAVERSE Project Costing for cost tracking.
- Attach unlimited documents and files.

Opportunities

- Receive, categorize, and refer opportunities.
- Obtain inquiries and reporting based on description, probability, date, and more.

General

- Optionally control access to contact information based on user.
- Print (mail-merge), email, and fax individual and bulk communications.
- Automatically save user preferences for filters and pick screens.
- Integrate with Microsoft Outlook and mobile devices for contacts and tasks.



Whether on the desktop, in the browser, or on mobile devices, there's a CRM deployment option to ensure your team has the information they need whenever and wherever they need it.