Clearly Different. Clearly Better.

Sales Management Features and Functionality

Opportunity **Management**

- Totally customizable opportunity screen
- Ability to search & filter opportunities using the built in Query Tool. Complex queries (using "and" & 'or") can be saved for private or public consumption and archived for future use
- When creating an opportunity from a company and contact record, demographics are inherited in the new opportunity record
- Ability to have multiple opportunity owners in addition to the account manager
- Use established sales methodologies such as Miller Heiman, spin selling, solutions selling, etc. or create your own customized methodology by modifying the "Close Probability", "Status", "Stage" and "Estimated Close Date" fields
- Use workflow to automatically assign "close probability" based on the "stage" chosen
- Use workflow to automatically notify the account manager, opportunity owner, opportunity approver or anyone else when certain conditions occur
- Ability to have manual adhoc notification to individuals for one-off specific opportunities
- Opportunity revenue & margin can be standalone or linked to a quote(s)
- Ability to upload attachments from your computer to the opportunity record. In cases when your quotes are complex or generated by a configurator, this feature allows you to attach external quotes to the opportunity in place of the internal quotes generated by the system
- Includes a "See All Related" section for a 360 degree view of all customer "touches" related to the opportunity (i.e. Quotes, Tasks, Emails, Contacts, other opportunities in the account, etc.)

Quotes

- Totally customizable opportunity screen
- Ability to search & filter quotes in Quote Log using the built in Query Tool. Complex queries (using "and" & 'or") can be saved for private or public consumption and archived for future use
- When creating a quote from a company, contact or opportunity record, demographics are inherited in the new quote record
- Ability to have multiple quote owners
- Use workflow to automatically notify the Quote Approver when "Status" field indicates approval needed. Ability to prevent further progress on quote status until approval is attained.

- Ability to automatically or manually notify others when a quote has been created or modified
- Ability to issue system-generated quotes numbers or customized per your numbering methodology
- Ability to have multiple versions of the same quote
- Ability to push quote to your backend Accounting or ERP system via a permanent integration point (i.e. web services, etc.)
- Totally customizable Line Item Form with “free form and drop-down field” capability, as well as a built-in capability for a Product and Services Catalog/Warehouse
- Ability to print (within the system) the quote (with Ts and Cs) utilizing a library of templates based on product/service type
- Ability to email (within the system) quote as a pdf file complete with messaging and attachments capability

Products & **Services Catalog/Warehouse**

- Totally customizable product/service screen
- Ability to search & filter products/services in Product/Service Log using the built in Query Tool. Complex queries (using “and” & ‘or”) can be saved for private or public consumption and archived for future use
- Manually or import (via integration) pertinent Product/Service data such as product ID, price, cost, etc.
- Ability to track inventory (with integration point) using Customer/Dealer, Quantity Allocated, Quantity Available, Quantity Back Ordered and Quantity Re-order Level fields
- Ability to create/configure kits using multiple products/services

Forecasts

- Ability to easily create product group revenue forecasts for each company
- Ability to create forecasts on opportunity record.
- Ability to create forecast tracking reports when sales quotas are inputted into the system and booked/shipped orders are imported into the system via integration

Sales **Management Dashboard**

- Totally customizable Sales Management Dashboard complete with charts, graphs and record logs for leads and opportunities (i.e. Opportunities by Stage, Won/Loss Revenue by Time Period, Sales Activities by Performer, Leads by Account Manager, etc.)
- Available workspace for each user to create their own dashboards with drag & drop capability.
- Charts and graphs have hover and drill down capability to expose underlying records used to generate them

Reports

- Using the robust Reporting Tool, we have generated numerous reports for your consumption such as Weekly Update, Customer Orders, Product Orders, YTD Forecast, Closed Opportunities, Sales Pipeline, Won/Lost Graph, Close Probability Funnel, etc.
- Reports include performer & Date Range capability
- Reports have capability to be scheduled as well as downloaded to PDF and MS documents such as Excel.

C2CRM™

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"Driving the Customer-Centric Revolution, One Business at a Time."