

Account Management with Exact Synergy Enterprise

In the Synergy Enterprise CRM (Customer Relationship Management) application, common Account Types used include Prospects, Leads, Suspects, Vendors, Associates or Customers. In this listing of normal CRM activities which may be completed using Synergy Enterprise functionality, we make no determination of different functions for either type of Account.

1. Account or Contact Look-Ups



2. Viewing and Editing of Account Data, secured by Resource's Roles



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 an Account



6. Creating Tasks for Other Resources



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



8. Retrieval of Documents from Synergy linked to Accounts or Contacts, Projects, Items or Sales Opportunities



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



10. Mass Word or e-Mail Campaigns



11. Creating New Prospects, Suspects, Leads or Associates



12. Creating New Contacts for Prospects, Suspects, Leads, Vendors, Associates or Customers



13. With a fully integrated system, viewing of historical customer orders, current orders, quotes and items sold directly from the Account Card. This information may come from multiple sources and combined using Microsoft SQL Reporting Services



14. Reviewing Activities – What did I do, When? (Specific Timeframe)



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



16. Entering Sales Opportunities for a Sales Pipeline



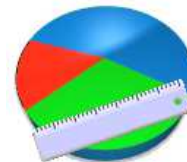
17. Managing Sales Forecasts (Quotes or Opportunities) for Prospects or Customers with a Sales Pipeline



18. Reminder of Overdue Activities



19. Marketing Campaign or Trade Show Projects - Capturing Accounts, Sales, Costs, Activities and Inquiries



20. Automatic Generation of Activities or Notifications to Accounts or Staff based upon Business Rules and Events in Database using the Event Manager



21. Awareness of New Accounts, Suppliers, Pricing, Items, Projects, Documents through News Pages



22. Awareness of Account Activities & Entry / Tracking of Notes from Other Departments within your Organization about Accounts through Pre-Defined Business Processes (Late Orders, Shipping Errors, Product Suggestions, Issues, Complaints)



23. Service or Support Call Tracking, Follow-up and Notifications



24. Creation and Use of a Knowledge Base for Support Inquiries



25. Integration with Microsoft Office (Word, Excel, PowerPoint)



26. Integration with Microsoft Outlook and it's Calendar



27. Portals, such as Employee, Customers, Resellers and Suppliers



28. Reporting with Multiple Options that include Standard Reports, Searches, Excel, Crystal Reports or Microsoft SQL Reporting Services



29. Customizations of Free Fields, Terms, Screens in Synergy



30. Mobile Applications using iPhones, iPads, Windows or Android Devices for the retrieval and entry of Account data while in a non-office environment.



31. Security by Roles to Enter, Edit (Modify), Search or Export Data



32. Access Synergy Remotely using Internet Explorer, Firefox, Chrome or Safari Browsers



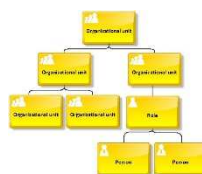
33. Creation of Workflow Business Process to ensure effective communications and completion of tasks in an orderly fashion



34. Integration of VOIP Phone Systems for Incoming / Outgoing Calls by Account or Contact Card Screen Pop-ups



35. Employee Hierarchy for Account Management.



36. Integration with Outside Marketing Tools.



37. Create Recurring Calendar Appointments for future follow-up, based upon your business rules



38. Marketing Segmentation of Accounts



39. Social Media Integration



40. Integration with Back Office ERP Software



41. Interactive Dashboards for KPIs and Other Metrics, Personalized for Resources



42. Partner or Distributor Management



43. Live Chat Integration with Synergy Enterprise Portals



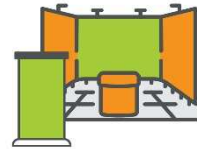
44. Account Metrics & Profitability



45. Geo-Location Functionality



46. Trade Show or Other Marketing Efforts Follow-Up



47. Importing of New Accounts / Contacts from Mailing Lists / Trade Shows



48. Sales & Marketing Repository of Sample Presentations / Proposals / Brochures



49. Mobile CRM Application (iPhone & Android) for Phones & Tablets



50. Social Collaboration within Your Organization

