Intuitive CRM



The Information to Grow and Maintain Healthy Customer Relationships

Managing your customer base with an integrated CRM solution will help your company improve your marketing, sales and support processes while increasing customer responsiveness and loyalty.

Intuitive CRM enables your company to maintain and track all facets of relationships with all business partners. Contacts, follow-up information, historical interactions, details of potential opportunities, marketing campaigns and more are immediately accessible with Intuitive CRM. The marketing and opportunity management features help your marketing and sales force find and capture sales, while the relationship management features help your entire organization maintain and support your customer, vendor and partner relationships.

Intuitive CRM comes with easy-to-read screens, usermanaged screen layouts, and drill-down capability into every detail. As part of the Intuitive ERP system, quotes, sales orders, shipments, collections issues and returns are all completely integrated with the Intuitive CRM solution.

RELATIONSHIP MANAGEMENT

The Relationship Management functionality provides the tools necessary to manage important business information not only about your prospects and customers, but also about vendors, business partners, and other third parties your company deals with.

Intuitive CRM's comprehensive relationship management features allow you to:

- Store an unlimited number of customers, prospects and companies, and unlimited contacts within each company.
- Record all interactions associated with a customer or prospect, including conversations, meetings, letters, faxes, e-mail messages, file attachments, and more.
- Access a complete history of a customer or prospect account, including quotes, orders, collections status, warranty status, and more.
- Schedule future interactions into your existing Microsoft Outlook calendar.

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| | | | | | | | | | | | | | | |
| Company | | Local | ion | | Active | Address | | City | Coun | Postal. | State | Default Em | ai | Web. |
| OppCo Limited | | Head | Quarters | | V | 775 Opp0 | lo Plaza | Opportunity | USA | 55512 | New Y | - | | |
| PacificTelephone | Co. | Pacific | Telephone Co. | | ¥ | 8512 Elm | Street | West Seattle | | | | | | |
| PacificTelephone Co. | | Telephone Company | | | ¥ | 8512 Elm | Street | West Seattle USA | | 98001 | W/A | | | |
| Parker Culvert Co | | Parker Culvert | | ¥ | 1350 King | shighway Blvd | Lawrence | | 50112 | KS | | | | |
| Peak Plastics Corporation | | Peak Plastics Corporation | | ¥ | 90 Ceram | ic Tile Drive | Lexington | USA | 28655 | SC | | | | |
| Peak Plastics Co | poration | Peak Plastics Corporation | | ¥ | 630 South | west Street | Bristol | USA | 25980 | AZ | Corp@Peak | Plastics.com | | |
| Peak Plastics Corporation | | Peak Plastics Corporation | | ~ | 630 South | west Street | Bristol | USA | 25980 | AZ | | | | |
| Plasti-Coat Corp. | | Plasti- | Coat Corp. | | ~ | C/O FIDE | LITONE DIST | . York | USA | 21074 | PA | | | |
| Plasti-Coat Corp. | | Plasti-Coat Corp. | | | ¥ | 1205 Det | wiler Drive | Raleigh | USA | 27604 | NC | | | 6 |
| Plasti-Coat Corp. | | Plasti-Coat Corp. | | 2 | | 1205 Detwiler Drive | | Raleigh | USA | 27604 | NC | | | |
| PVC Plus | | PVC P | lus | | 2 | 203040 F | irst Ave | Pittsburgh | | | | | | |
| PVC Plus | | PVC P | lus | | 1 | 203040 F | irst Ave | Pittsburgh | USA | 23556 | PA | | | 8 |
| Full Name Adhienne Taylor Janet Hebron | Title Office Manaj Diocumentati | let | Phone 1 444-222-2222 444-222-2234 | Phor direct direct | ie Ext 1 | Date & T | | √ Activity Phone Note | | | | Result Cal Completed Note Created | | |
| Watten Randle | Marketing M | ana. | 444-222-2210 | direct | | 10/7/200 | I4 7:12 PM | Phone | | Jack called | to incr | Call Completed | Intuitive | ERP |
| Jack Fraser | CEO | | 415-228-4563 | | | | | | | | | | | |
| | | | | | | 144 44 4 | Record 1 of 3 | • • • • • • • • • • • • • • • • • • • | | | | | | |
| Opportunities | | | | | | | | | | | | | Eilter Os | ations 🔶 |
| Short Descr | ong Detct | Statue | Active | 1 | and Source | Intuitive Du | Dollar Value | Next Action | Estimated | | Confi | Clored Bu | Close Date | Sales Fu |
| New engine. | | ben | | | eferral | | | 8/21/2004 | 4/10/2004 | | | Backflush | 09-Apr-2004 | 3 · Almos |
| RF0 450 | C | pen | | C, | alled Client | | | | | | 50 % | | | 1 · Appro- |
| OppCo 4 | c | losed | | | | | | | | | 65 % | | | 2 · Prospe |
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- Work in a team environment with multiple members on an account.
- Create document distributions based on Mail Merge features of Microsoft Office.
- Attach documents and emails to contacts or companies.
- Automatically create Microsoft Outlook To-Do lists.
- Assign activities to other team members and notify them by email.
- ✓ Output any data to Excel with one click.
- Record an unlimited number of notes per contact.

OPPORTUNITY MANAGEMENT

The Opportunity Management functionality maximizes the efficiency of your sales force by helping to manage and identify the best strategy for moving to close the deal. By providing a tool to effectively manage every component of an opportunity, Opportunity Management helps your sales professionals focus on the opportunities that exist in your sales funnel and capitalize on that sales potential with prospects and increased business from existing customers.

Intuitive CRM's complete opportunity management features allow you to:

- Manage sales opportunities by creating and linking opportunity records to specific accounts.
- Track opportunities, including percent chance of close, opportunity value, and all associated data.
- Add user-defined fields to each opportunity record.

| lasks | (a) << Security | General I | nformation | | Product Information | | | |
|--|----------------------|--|--------------------------------------|-----------|---------------------|--|--|--|
| Inactivate Opportunity | Opportunity ID | 1024 | | | | | | |
| Do Note Do Incoming Call | Short Description | New engineering project | | | | | | |
| Do Incoming Call Do Outgoing Call Do Document Do Letter Do Fax | Long Description | Project for new electronics cabin system for the new 76.7 program. | | | | | | |
| Do E-mail | Status | Open * | Intuitive Quote ID | | | | | |
| Schedule Task | Sales Funnel | 3 · Information ¥ | Next Action Plan Date | 8/21/2004 | | | | |
| Schedule Meeting | Currency Type | USD - English/United States | Lead Source | Referral | | | | |
| Link E-mail Link Document | Misc. Dollar Value | \$421.00 | Estimated Close Date | 4/10/2004 | | | | |
| | Product Dollar Value | \$924.00 | Close Confidence | 99 % | | | | |
| | Total Dollar Value | \$1,345.00 | | | | | | |
| | Action Plan Comment | Customer wants to set up a kick off meeting | ig with Engineering to discuss proje | ct plan. | | | | |
| General Information | | | | | | | | |
| Product Information | | | | | | | | |
| | | | | | | | | |
| | Sales Mgr Comment | Schedule the meeting for next Friday and | rivite Bob and Sue as well. | | | | | |
| Related Companies | | | | | | | | |
| User Defined Fields | | | | | | | | |
| Administrative Information | | | | | | | | |
| | | | | | | | | |

- Schedule interactions, such as follow-up phone calls and onsite meetings, into your existing Microsoft Outlook calendar.
- Maintain a complete history of activities with specific notes about each opportunity.
- Create and link appointments, tasks, notes, documents, emails and activities to specific sales opportunities.
- Report on sales funnel and opportunity progress.

MARKETING MANAGEMENT

The Intuitive CRM marketing management features provides a single location to create and track the details—and results—of your company's targeted marketing campaigns. You can create targeted mailing lists of potential and/or current customers with the Search Manager and select the search to be associated with the marketing campaign. Deploy a campaign by automatically creating a mass-email or mass mail-merge document to all campaign participants. You can easily keep track of participants pre- and post-launch.

| 🟮 Campaign ID | Newpr | oduct promotion (100) | | | | 6 6 9 8 | |
|-----------------------------|----------|---------------------------|------------------------------|---------------|-----------------|-----------------|--|
| Tasks | ۲ | << General Information | ts | Responden | | | |
| New Campaign | | Grid Options | | | | | |
| Launch Campaign | | 😕 Open Layout 🛃 Save Li | ayout 👩 Export | | | Collapse All Ro | |
| | | | | | | | |
| Deploy Campaign | | Company | Location | | ▼ Contact | ▼ Post Launch | |
| | | MixEo Conglomerate | Central | | Jim Bean | | |
| | | Colson Plastics | Colson Plastic | 1 | Ven Ackernan | | |
| Campaign Stats | (2) | Automated Design Systems | Winnipeg | | Dmitry Kirshner | E I | |
| Jampaign Jiais | <u> </u> | Advantage Controls Inc | Advantage Cr | ntrok Inc | Lori Pritchett | | |
| Participant Count 26.0000 | | Anderson Steel, Inc. | Anderson Ste | | Roger Anderson | E I | |
| Respondent Count 9.0000 | | IncCo International | Alberta | | Gem Ryan | F | |
| | | EGS Electrical Group LLC | EGS | | Don Sasse | v | |
| Percent Response 34.62 % | | LaBarge Technologies | LaBarge Tech | nologies | Greg Shulman | V | |
| | | Plasti-Coat Corp. | Plasti Coat Co | ф. | James Valley | Г | |
| | | Automated Design Systems | Winnipeg | | Roy Drenker | Г | |
| | | Ace Hardware | Ace Hardware | | Bob Bigelow | F | |
| | | Eaton Corporation | Eaton Corpora | ation | Nancy Hom | V | |
| | | Office Supply Inc. | Office Supply | -N0 | Sally Huff | Г | |
| | | Anvil International | Anvil Internati | onal | Scott Sanchez | Г | |
| | | Automated Design Systems | Edmonton | | Hans Berger | Г | |
| | | OppCo Limited | Head Quarter | \$ | Jack Fraser | V | |
| | | Advantage Controls Inc | Advantage Co | antrols Inc | Rick Larson | V | |
| | | Alpha Business Works | Alpha Busine: | | | — | |
| | | LaBarge Technologies | LaBarge Tech | | James Wright | | |
| | | Equipment Development Co. | | welopment Co. | John Sturch | — | |
| Participants | | Advantage Controls Inc | Advantage Co | | Kim Vaughn | v | |
| | | Eaton Corporation | Eaton Corpora | | Mike Diley | V | |
| | | Office Supply Inc. | Office Supply | | Jack Stephano | Г. | |
| Administrative Information | | Eviro Systems Co | Enviro System | | Bob Stanley | V | |
| Administrative infolination | <u>S</u> | Parker Culvert Co | Parker Culver | | Roger Wheeler | V | |
| | | Advantage Controls Inc | Advantage Co | antrols Inc | Kevin Bennett | V. | |
| | | Add Participant Re | move Participant | New Response | 1 | | |

After launching a campaign, Intuitive CRM allows you to manage responses and associate opportunities to campaigns. A Marketing Response wizard is incorporated directly into the pane system, allowing users to quickly enter response information. You can compare actual responses with forecasted response rates to determine campaign ROI.

Intuitive CRM also complies with 'Do Not Solicit" regulations, ensuring that companies / individuals who request to be removed from future campaigns are automatically excluded from future campaigns.