

## 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.

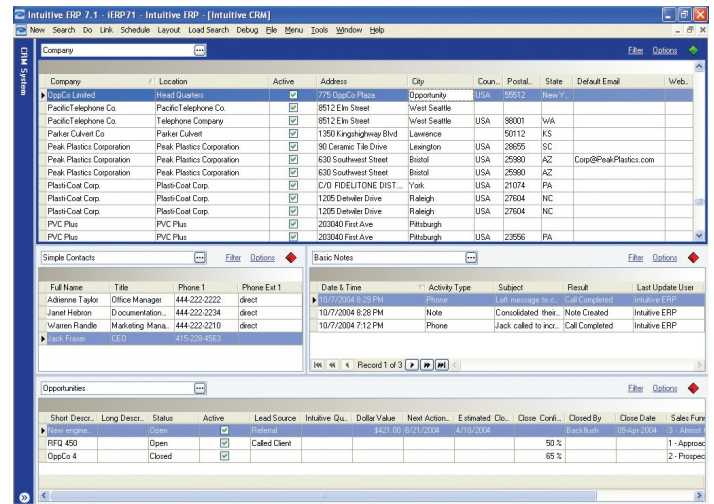
Intuitive CRM comes with easy-to-read screens, user-managed screen layouts, and drill-down capability into every detail. As part of the Intuitive ERP system, quotes, sales orders, shipments, collections issues and returns are all completely integrated with the Intuitive CRM solution.

### 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.



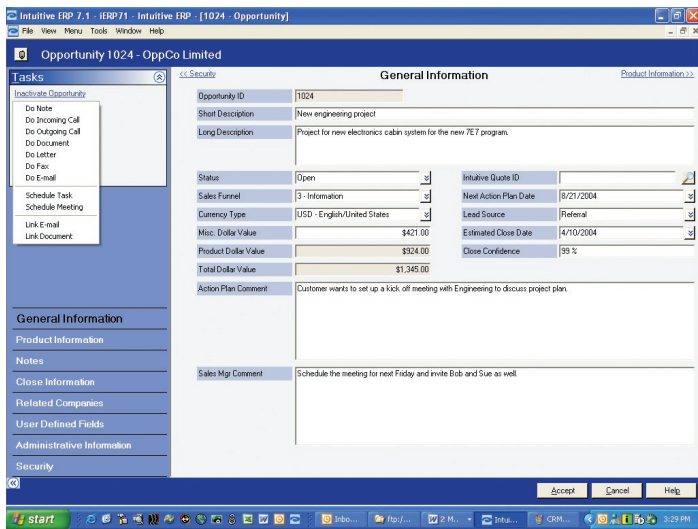
- ✓ Work in a team environment with multiple members on an account.
- ✓ Create document distributions based on Mail Merge features of Microsoft Office.
- ✓ Attach documents and emails to contacts or companies.
- ✓ Automatically create Microsoft Outlook To-Do lists.
- ✓ Assign activities to other team 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.

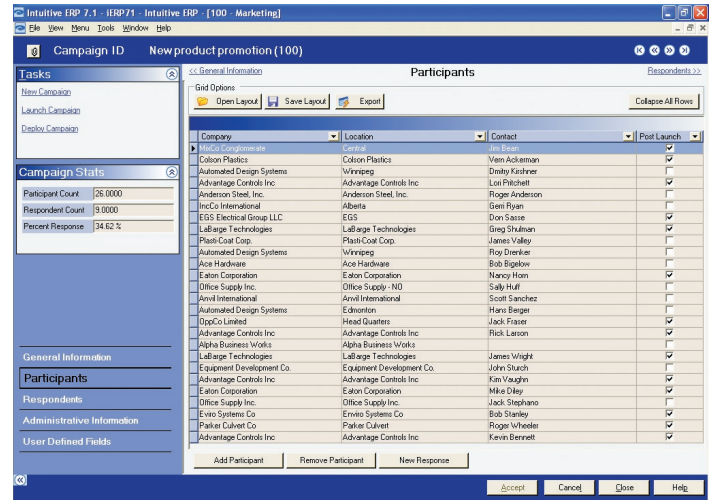
Intuitive CRM's complete opportunity management features allow you to:

- ✓ 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.



## 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.



- ✓ 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, e-mails and activities to specific sales opportunities.
- ✓ Report on sales funnel and opportunity progress.

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.