



## CUSTOMER RELATIONSHIP MANAGEMENT

*Identify and attract profitable customers; manage the complete sales cycle*

A marketing department needs to provide strong leads to the sales group; this may involve a number of activities designed to initiate a relationship with prospects, including advertising, telemarketing, direct mail, special events and more. TRAVERSE Customer Relationship Management (CRM) gives you seamless control of your marketing programs and lets you do an online analysis of their effectiveness.

TRAVERSE CRM then guides your sales team through every aspect of the sales cycle, enabling them to qualify the sales opportunities that will bring maximum revenue with minimum resources and within time constraints. A real-time integration to other TRAVERSE applications provides access to ERP data such as open invoices, sales history, etc.

You can maintain unlimited contact names, methods (phone, email, fax, etc.) and user-defined fields for contacts and contact names. You'll be able to define campaign types such as Print, Direct Mail, Radio, etc. and maintain your campaign dates, costs and responses. Receive, categorize and refer opportunities, and analyze your campaigns by optionally assigning values and campaign references.

The screenshot shows a software window titled "CM - Contacts". At the top, there is a search bar with "Ace Computer Power Supply" and a "Status" dropdown set to "Active". Below this are several tabs: "General", "User-Defined", "Contact Names", "Activity", "Opportunity", and "Notes". The "General" tab is active, displaying the following information:

- Address 1: 1437 Bellview Avenue
- Address 2: (empty)
- City: Richfield
- Region: MN, Country: USA
- Postal Code: 55423-
- Link Type / ID: Vendor, Ace001

On the right side of the "General" tab, there is a section titled "Excluded Campaign Types" with a list of checkboxes:

- Blast Fax
- Bulk eMail
- Direct Mail
- Local Print
- National Radio
- Product Rollout

Below the address fields are buttons for "View Map", "Documents", "Tasks", "Orders", "Invoices", and "History". At the bottom of the form, there is a "Contact Methods" section with several dropdown menus:

- Business Phone: (612)-805-6782
- Business Fax: (612)-805-6024
- Company Main: (612)-800-6700
- Mobile: (empty)
- eMail: info@osas.com
- Alternate eMail: (empty)
- Pager: (empty)
- After Hours: (empty)

At the very bottom of the window, there is a small text field containing "Continental Products Unlimite sa".

*Maintain contact information for customers, vendors, prospects, etc.*



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## Contacts

- Optional link to TRAVERSE customers, vendors and employees
- Automated and manual activity tracking
- Import, export, and synchronization of contact information
- Unlimited document and file attachments
- "Opt-out" settings for individual campaign types
- Inquiry to orders, history and other information in TRAVERSE

## Activities

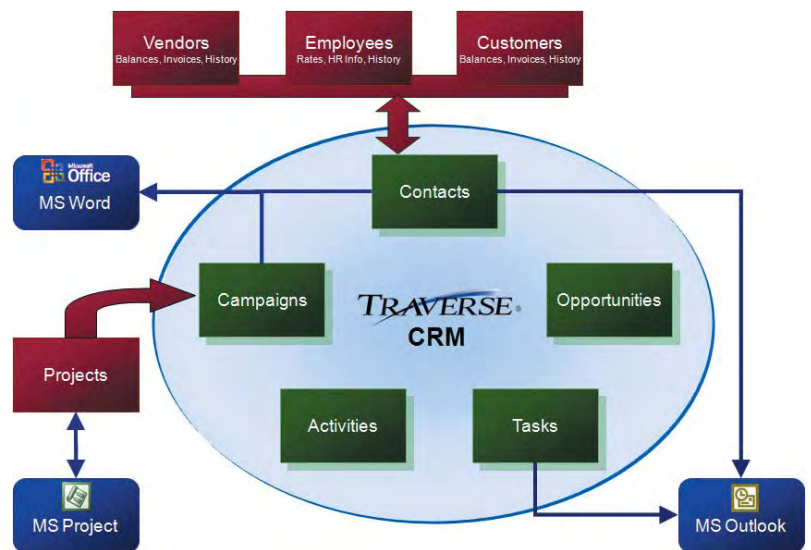
- Automated tracking of data activities (add, edit, delete)
- Assign label printing or bulk communication activities to contacts or campaigns
- Manual entry of activity for individual call entry or information tracking
- Unlimited user-defined fields for activities

## Tasks

- Task list and interactive task management screen
- Assign task follow-up dates and actions
- Allocate tasks to other users for activities

## Campaigns

- Campaign analysis reporting including response count and value
- Optional interface to TRAVERSE Project Costing for cost tracking
- Unlimited document and file attachments



## Opportunities

- Receive, categorize and refer opportunities
- Inquiry and reporting based on description, probability, date and more

## General

- Individual and bulk communication via print (mail-merge), email and fax
- Automatic saving of user preferences for filters and pick screens
- Integration to MS Outlook and PDAs for contacts and tasks