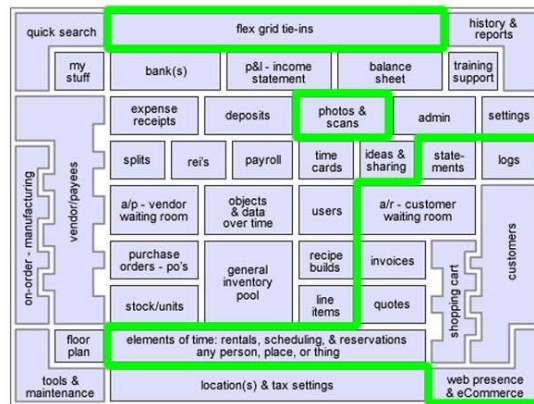
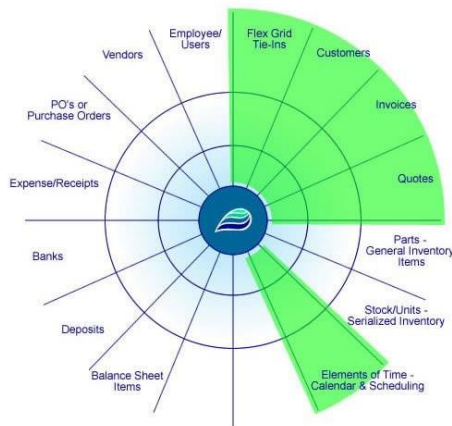


Business Functions - CRM - Customer Relationship Management

CRM (Customer Relationship Management) Functions



➤ CRM - Customer Relationship Management

- Sales & purchase tracking
 - Payment tracking
 - Monies owed
 - Accounts receivable
 - Purchase histories
 - Invoices/quotes
 - Customer queue & sub-queues
- Customer profiles
 - Holds additional information & subs
 - Log notes
 - Additional contacts
 - Reoccurring billing
 - Purchase & payment history
 - Groups & types
 - Preset options - discount & tax category
 - Photos, scans, files, media
 - Expandable custom fields
 - Manage relationships
 - Unlimited customers
- Customer tracking & follow-ups
 - Unlimited notes & logging
 - Show/hide notes on calendar
 - Show/hide notes in customer portal
 - Purchase histories - What did they buy?
 - Accounts receivable - What do they owe you?
- Calendaring & scheduling
 - Elements of Time
 - Reporting
 - Billing