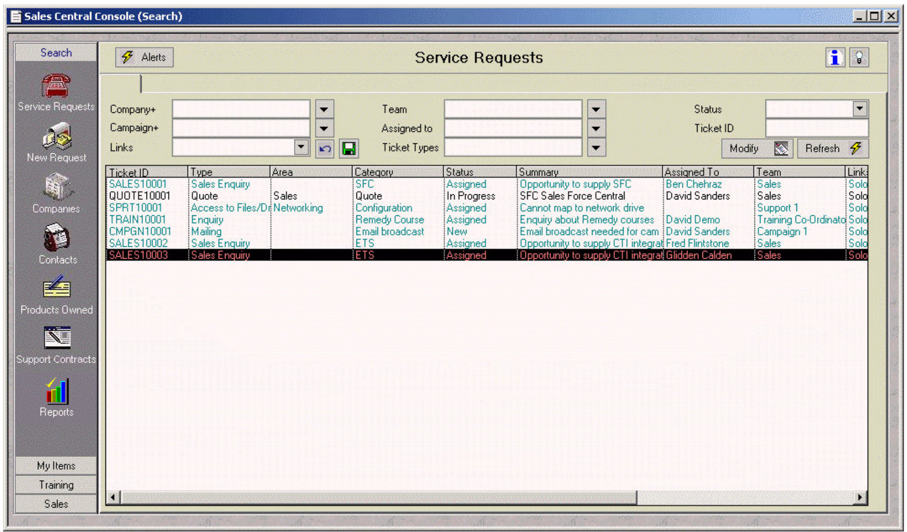
Sales Central@Work™

A CRM Solution for Business – Built using the market leading Remedy® ARS workflow management software, *Sales Central@Work* is a comprehensive application to manage your interactions with your customers, providing you with an overview of all your communications and contacts with them. Having access to full information provides you with the ability to improve your support and service to your customers, and to increase the effectiveness of your sales and marketing efforts.

Campaigns and Leads Management

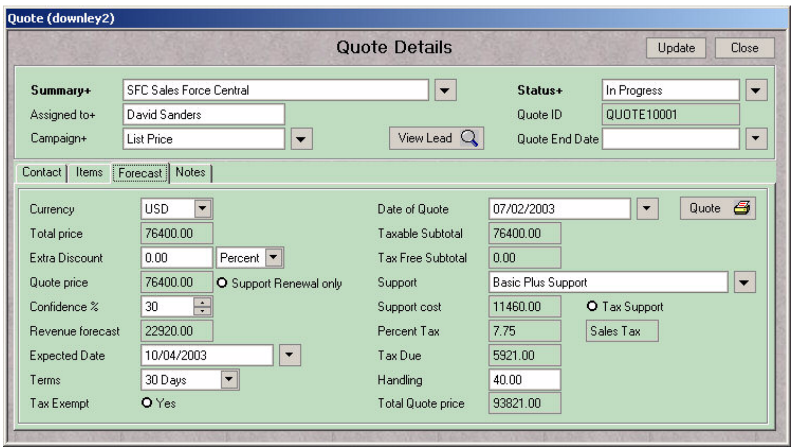


Sales Central@Work provides a comprehensive system to allow you to plan, manage and schedule your marketing campaigns, to allocate resources and to record budgets and costs. Campaign tasks can be linked to the campaign and are scheduled and progressed individually. The power of the Remedy workflow management system is used to ensure that target dates are met and that tasks are allocated to the correct resources. If needed, a built in approval process can be used to make sure that plans are reviewed and approved before they are implemented.
Sales leads can be efficiently recorded, linked to campaigns and categorised by source and market sectors. The applications allows you to allocate leads to your sales teams for follow up. The built in reporting and segmentation processes allow you to monitor lead progress and the effectiveness of your sales efforts. Each lead is linked to customer or prospect detail records which are used to build up a history of your interaction with your customer.

Appointment and Reminders

Appointments scheduling and built in reminders can be created, which are linked to Leads or contact records to allow you to manage the presales process, call backs and follow up actions. Your staff can manage their time effectively by using the calendar or scheduled action views to get an overview of their workload and make sure that important tasks are not overlooked. Meeting and reminder details can also optionally be transferred to Microsoft Outlook.

Sales Quotations, Invoices and Forecasts



Sales Central@Work allows you to generate Sales Quotes from the built in product and service catalog, including multiple line items, currencies and discounts, and to record ranking/confidence and expected revenue dates to produce Sales Forecast reports analyzed by sales team or campaign.

Sales Taxes are automatically applied, and the system allows you to output printed quotations, invoices and supplier purchase orders from Excel templates, as well as to create records of new support contracts and products owned for future support requests.

Mailmerge, Form letters and Email Broadcasts

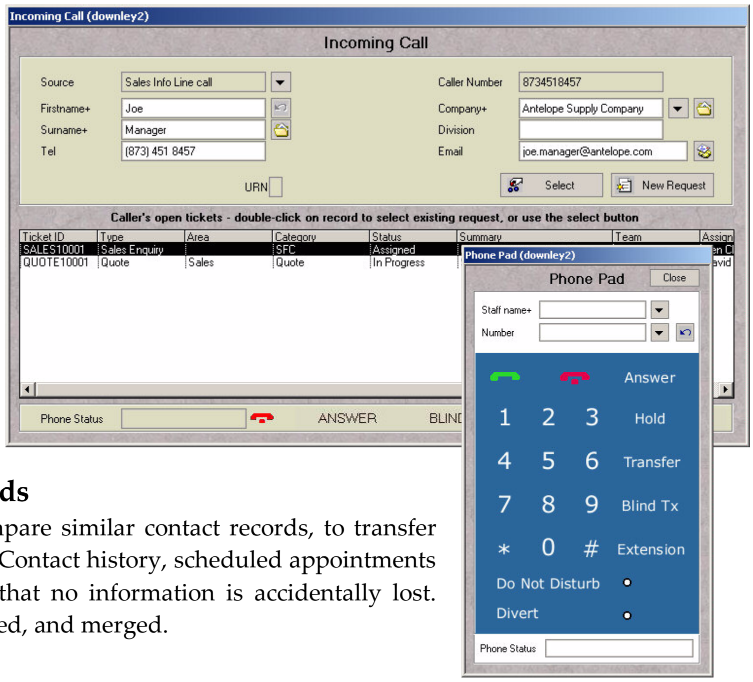
The application includes the ability to perform mailmerges to form letters in Microsoft Word, or to export contact data to Microsoft Excel for use in other applications. Contacts can be selected using a variety of criteria including market sector, lead source, geographical location, sales assignment, products owned or from personal lists of contacts maintained in the application. In addition, records can be selected and transferred into Microsoft Outlook for email broadcast. Details of all operations can be recorded and linked to the individual contact records and the marketing campaign so that you maintain a complete record of your activities.

Create Personal Contact Lists to Manage your Work

Users may select contact records and add them to personal contact lists to allow them to create bespoke groups of records to be used in campaigns and mailmerges, or to help organize their work. Contact records can be included in multiple personal lists, but all notes and appointments are linked to the main contact record to ensure that full contact history is available to all users at all times.

Telephony Integration (CTI)

Sales Central@Work comes with an optional pre configured integration with the *Enterprise Telephony Suite* from Tiberone Technologies Ltd to provide full integration with your telephone switch. Outgoing calls can be initiated from Lead, Request or Contact records, and incoming phone calls can automatically screen pop customer details and call history. Details of incoming calls are automatically recorded against the appropriate contact and request/lead record. Integrations with alternative CTI applications can also be set up easily.



Managing duplicate addresses and contact records

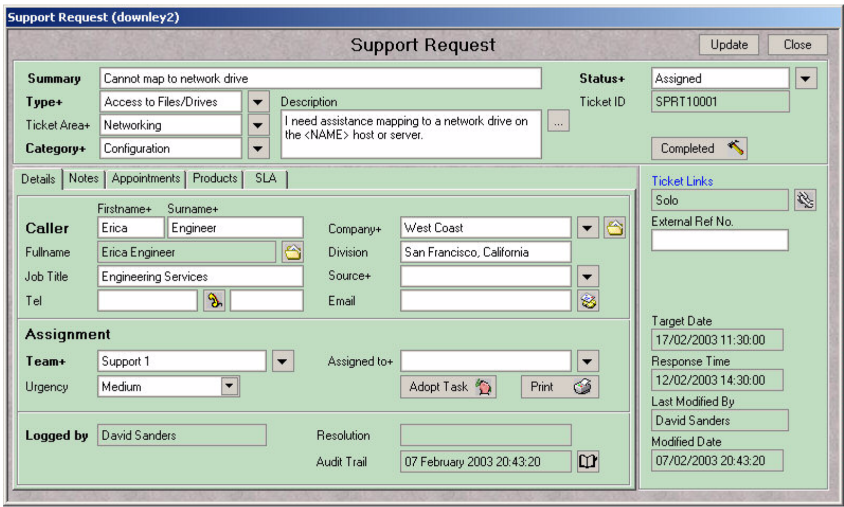
The application provides the functionality to find and compare similar contact records, to transfer information between them and to merge duplicate records. Contact history, scheduled appointments and notes are all automatically transferred to make sure that no information is accidentally lost. Duplicated company records can also be viewed and managed, and merged.

Product Catalog and Products Owned

The application contains an easily configurable Product Catalog which allows you to set up details of products or services offered, as well as product prices, versions, platforms and environments. Product prices may be linked to Campaigns. The catalog is then used to quickly create records of products owned by customers so that details are available from service request and contact records.

Support Request Management

The *Sales Central@Work* application contains a fully feature customer support module to allow you to record and manage your support and service to your customers. Support Requests are created, linked to customer contact records and products owned, and automatically routed to the correct support team based on the categorisation of the request.



Targets for request resolution are automatically set based on problem type or customer service level agreement, and escalations and notifications are used to ensure that problems are addressed and resolved on time. The time taken to resolve requests is automatically calculated for performance metrics, and reports can include total elapsed time, working hours elapsed and time on hold awaiting third party action or information from customers, to provide you with a comprehensive view of the service you are delivering to your customers.

Support Contracts and Service Levels

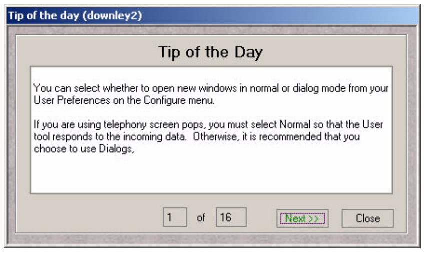
Details of support contacts can be recorded in the application, linked to customers, locations, products or contacts. When support requests are received, any service levels specified in support contracts are used to ensure that customers receive the correct level of service. The application will also send notifications to contract teams to remind them of support contracts which are about to expire.

The Training and Course Management Module

Sales Central@Work also includes a comprehensive and fully featured training module. Course Templates are set up which are used easily to create records of scheduled courses. Delegate bookings are recorded, linked to contact records, and booking status can be progressed from Training Lead, provisional booking to confirmed delegate. The application allows you to manage waiting lists, to transfer delegates between courses, to produce quotations and invoices, and to produce reports of courses and projected revenues. The mailmerge and email facilities of *Sales Central@Work* can also be used to communicate with delegates or to produce course documentation and delegate badges.

The Sales Central Console

Access to the complete application is provided through a single simple Console screen which is intuitive to use and provides simple graphical menus and options to navigate and search the data. Users have the ability to save common searches or data selections and restore them at any time, and lists of leads and requests in progress and workloads are clearly displayed.

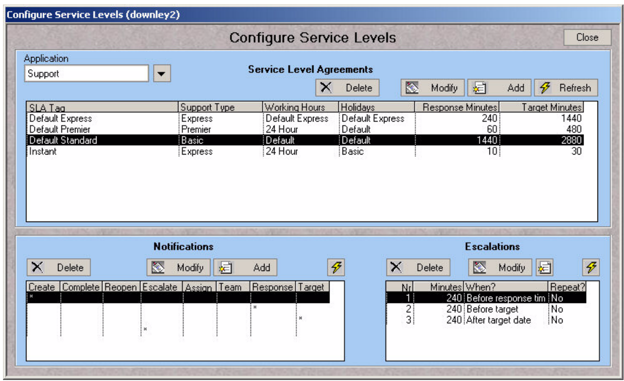


Automatic Archiving of Old Requests

Sales Central@Work has built in workflow to automatically archive your old request and lead records to a separate set of data tables so that the amount of data stored in your live application can be controlled. The time that old records will be retained is configurable for each of the main tables, giving you the flexibility to make sure that information important to you is always available, but historical data volumes do not adversely affect your system performance.

Adaptability and Flexibility

Being based on the market leading Remedy ARS software, the *Sales Central@Work* application can be easily and quickly adapted or configured to suit your individual business needs. Much of the configuration of the application is data driven, allowing many changes to be made by business users, rather than Remedy developers. Some of the features that have been incorporated are:



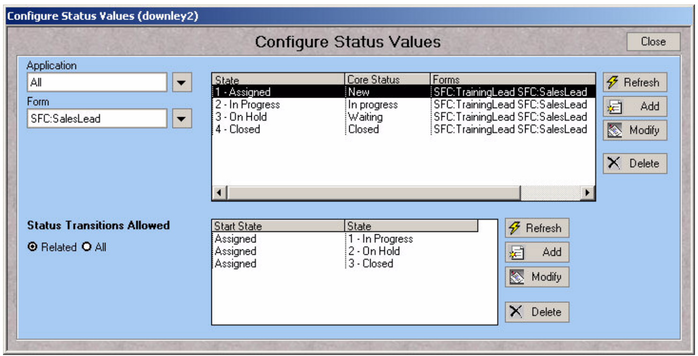
Data driven escalations and notifications: Multiple escalations can easily be configured and data records created to determine who notifications should be sent to. Escalations and notifications are linked to SLA records, so can be tailored to individual customers if needed.

Management of teams and team members: Administrative users can easily set up new sales or support teams, and add and remove team members through a simple configuration screen. Teams can be linked to particular request categories so that Leads and Support Requests are automatically assigned to the correct staff.

Record locking: The application uses workflow data locking to ensure that two users do not attempt to update the same record at the same time, whilst allowing multiple users to view records and add notes and other linked information.

System Announcements and Tips: Announcements can be displayed to users when they log on to the system, for example to inform them of scheduled maintenance downtime or special offers or team performance. Tips can also be set up to inform the users of new features, best practice and to help ensure that your users get the most out of the system.

Redirecting notifications to other users: If a user is going to be unavailable, the application provides the ability for the user to redirect all system notifications to an alternative staff member to be dealt with during their absence. In this way you can ensure that important milestones or follow up actions are not missed because of a temporary absence.



Changing passwords: Users have the ability to change their own Remedy system passwords through the application via a simple interface.

Data driven Status Transitions: Available statuses for leads and requests and the transitions from one status to another are set up and configured through the application and can be managed by a business user.

Records of Licence Usage: The application creates a record each day of all the users that have logged in with details of their licence type and client version, allowing you to monitor system usage, manage licence allocation, and identify users who need software updating.

Scalability

The Remedy AR System is a fully scalable client server solution which allows you to grow your application as your needs grow. As well as the Windows based client software, there is also a web based interface allowing you flexibility in how you connect to your application. For larger installations, the Remedy Distributed Server Option allows you to exchange and synchronise data between multiple Remedy servers.

Users are licensed for Remedy on a per seat basis with either fixed or floating (shared) user licences, but there is no separate application licensing for *Sales Central@Work*

System Requirements

Remedy AR System version 5.0 or above

Workflow Data Servers

- Microsoft Windows NT /2000
- Sun Solaris
- Hewlett Packard HP UX

Databases

- Oracle
- Sybase
- SQL Server

Further information:

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