DATASHEET

ProfitKey CRM

ProfitKey's CRM is a flexible solution that is tightly integrated with PK ERP. PK CRM provides the core CRM functionalities that custom manufacturers need to integrate Selling activities with the manufacturing operations; Contact Management, Activity Tracking, Quote/Proposal Management, and Lead Management.

The benefits of tight integration with your ERP solution include…

- Saving your sales staff time by providing one place for them to find all information they need on customers
    - Either from their desk or from a tablet anywhere with internet connectivity
- Eliminating redundant data entry and costly data entry errors
- Suppling salespeople the real-time information on the status of customer orders, invoices, and quotes they need to help them manage their accounts and opportunities
- **Note**: A separate PKI ERP license is not required for CRM Module users. CRM seats are priced at 40% of the PKI ERP seat price.

1. CONTACT MANAGEMENT:

The CRM module has full access to the Contact List within PKI ERP including the master customer contact, "ship to", and "bill to" contacts/addresses. These contacts can be updated with new information from the CRM module and new Contacts can also be created.

User defined fields are available to add to the Contact (Spouse, children, ages, birthdays, favorite pastimes, etc.) to help build/maintain relationships with customers.

2. ACTIVITY TRACKING:

This list will display all contact activity with the customer, such as Product install, phone call, email, etc. The user can manually add each activity to this list, and indicate a schedule dated date and completion date. Emails can also be attached to contact activities.

Activities not marked as complete will be on the user's CRM Scheduled Activity Listing as they enter the CRM system. Reminders for activities can also be scheduled.

3. QUOTE/PROPOSAL MANAGEMENT:

From the CRM module the user can see all quotes for the customer, both open and closed. Using the New 'Quote Won / Lost' column, it will also display the win / loss status of each quote.
The salesperson can see all sales orders, sales order detail lines, and sales order history, as well as open and paid invoices and can check if the customer is on hold from the CRM module.

The salesperson can modify Job/Lots so each Quote can have a unique product structure.

4. LEAD MANAGEMENT:

With access to the Quotes from the CRM module, the salesperson as well as their management, can see the stages for outstanding quotes and leads associated with a customer.

PROFITKEY
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Need to add screen shots for each of these functionalities