

Sales opportunities happen anywhere and everywhere, so you need to have critical customer information at your fingertips when opportunity finds you. ProcessPro Global Customer Relationship Management (CRM) gives you complete control of your customer information whether you're at your desk or miles from the office, browsing email or visiting customer sites.

No matter how your employees connect with the office, ProcessPro Global CRM provides deployment options to give your team access to the information they need, tailored to fit their role. Integration to other applications provides access to a wide range of information while providing the security needed to keep your data safe.

Key Features

- Deploy CRM on the desktop, in a browser, on mobile devices or in Microsoft Outlook.
- Maintain unlimited contact names, methods (phone, email, fax) and user-defined fields for contacts.
- Receive, categorize and refer opportunities. Analyze your campaigns by optionally assigning values and references.

The screenshot displays the ProcessPro Global CRM interface. The main window shows a contact profile for 'Dave Smith', a VP of Operation, with contact details and a list of tasks. Below this, there are tables for 'Activities' and 'Opportunities'. The 'Activities' table lists various sales activities with their dates, values, and durations. The 'Opportunities' table lists potential sales leads with their status, referred parties, and target dates.

Task Type	Description	Assigned To	Due Date	Status	Priority
Install	New Product	Alice		Not Started	Regular
Quote	Proposal	Ted	3/2/2016	In Progress	High
Call	Follow Up	Bob	3/4/2016	Waiting on someone else	Low
Quote	Revisions	Ted	3/11/2016	Not Started	Regular

Activity Type	Description	Date/Time	Value	Duration	Notes
Sale	Registration	1/25/2016 6:27 ...	200.00	0.000	Interested in new
Quote		4/24/2014 5:09 ...	5,425.00	0.000	Wants to upgrade
Shipping Errors	customer said b...	7/12/2012 11:28...	0.00	0.000	

Descripti...	Status	Referred...	Value	Target D...	Probability	Resolution	Notes
Welcome	Active		0.00				
Visit	Active	DBG Partn...	750.00	6/30/2016	Initial Requ...		Met with D...
Guest	Active		150.00	9/15/2016	Balperk Pr...		

Take advantage of the rich sales and marketing data in your ProcessPro Global system without changing programs or even screens. Easily maintain contact information and campaign data, and share it with your organization.

Contacts

- Link to customers, vendors and employees.
- Establish relationships between contacts, such as employees within a company or corporate structure.
- Import, export and synchronize contact information.
- Access orders, history and other information within ProcessPro Global.

Activities

- Automate tracking of data activities.
- Assign label printing or bulk communication activities to contacts or campaigns.
- Create unlimited user-defined fields for activities.

Tasks

- View task lists and interactive task management screens.
- Assign task follow-up dates and actions.
- Allocate tasks to other users for activities.

Campaigns

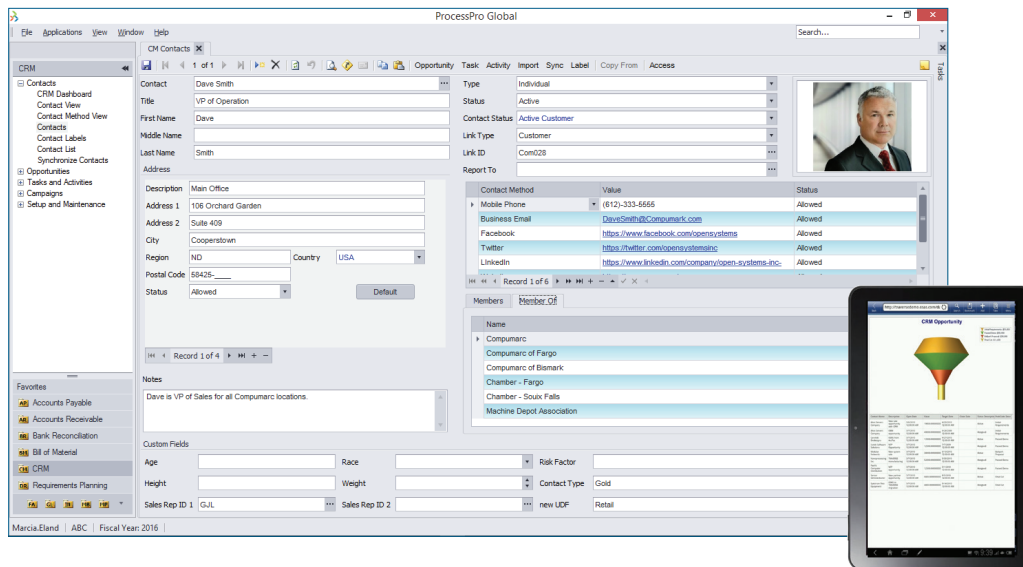
- Obtain campaign analysis reporting, including response count and value.
- Interface to Project Costing for cost tracking.
- Attach unlimited documents and files.

Opportunities

- Receive, categorize and refer opportunities.
- Obtain inquiries and reporting based on description, probability, date and more.

General

- Optionally control access to contact information based on the user.
- Print (mail-merge), email and fax individual and bulk communications.
- Automatically save user preferences for filters and pick screens.
- Integrate with Microsoft Outlook and mobile devices for contacts and tasks.



Whether on the desktop, in the browser or on mobile devices, there's a CRM deployment option to ensure your team has the information they need whenever and wherever they need it.