

## SALESOUTLOOK CRM

### Product features

SalesOutlook is a fully featured and powerful CRM system that integrates within Microsoft Outlook® and Microsoft Exchange®. It is extremely user friendly adding many features to increase productivity and efficiency in an environment where your staff are already comfortable using.

The Information you need is never more than one or two clicks away in the most commonly used application of them all: Microsoft Outlook®. Because of its tight integration within Microsoft Outlook®, SalesOutlook can harness all of the power of Microsoft Office, allowing you to maximise your investment on the infrastructure that you already own!

### Account Management

Microsoft Outlook® is designed to be a Contact based application and consequently organises all of its information around Contact records. SalesOutlook fundamentally changes this perspective, turning Outlook into an account based application.

This enables Outlook's contacts to be displayed as individuals within an organization, in a hierarchical manner, allowing your organisation to define account associations such as accounts with multiple office locations, branch accounts, and any associated relationships such as suppliers or associates. All information pertinent to an account, such as Contacts, notes, emails, opportunities, service items, and other related information are accessible from a single form, enabling the user to gain a snapshot of all activities and information with the minimal amount of effort.

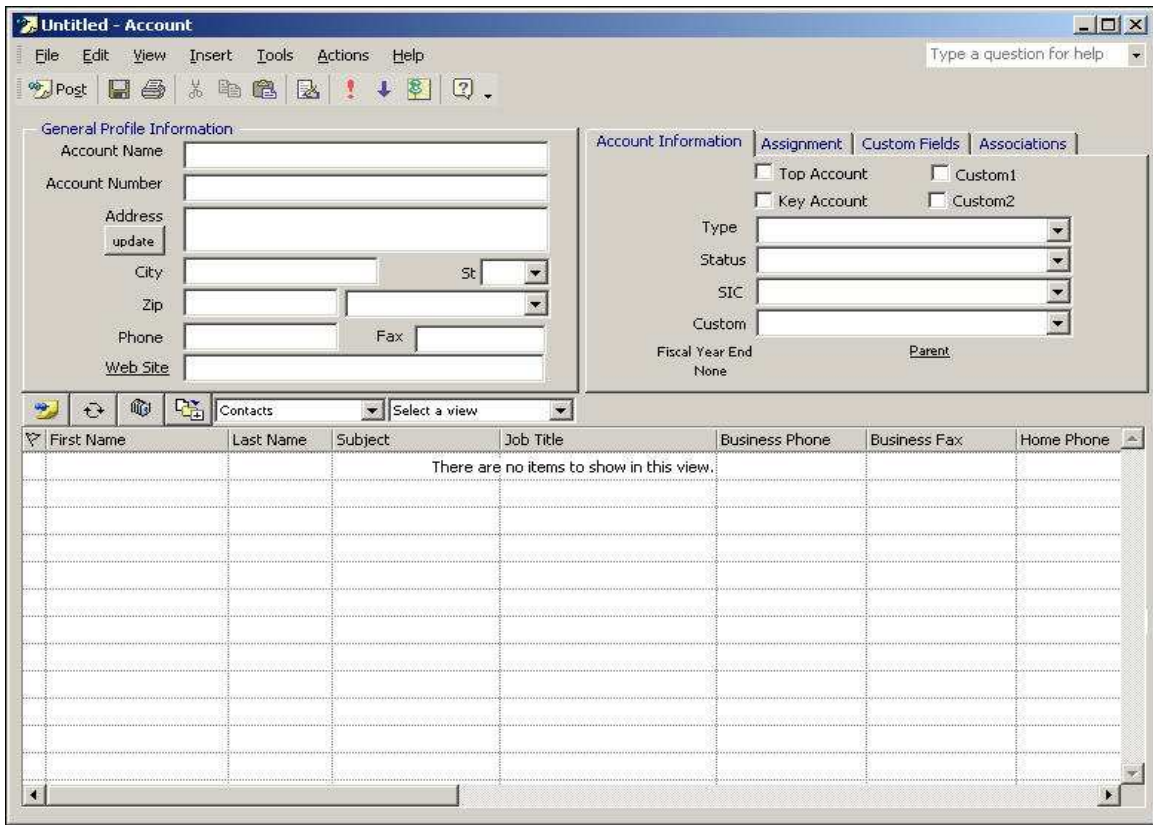


Figure 1: SalesOutlook– Account Window

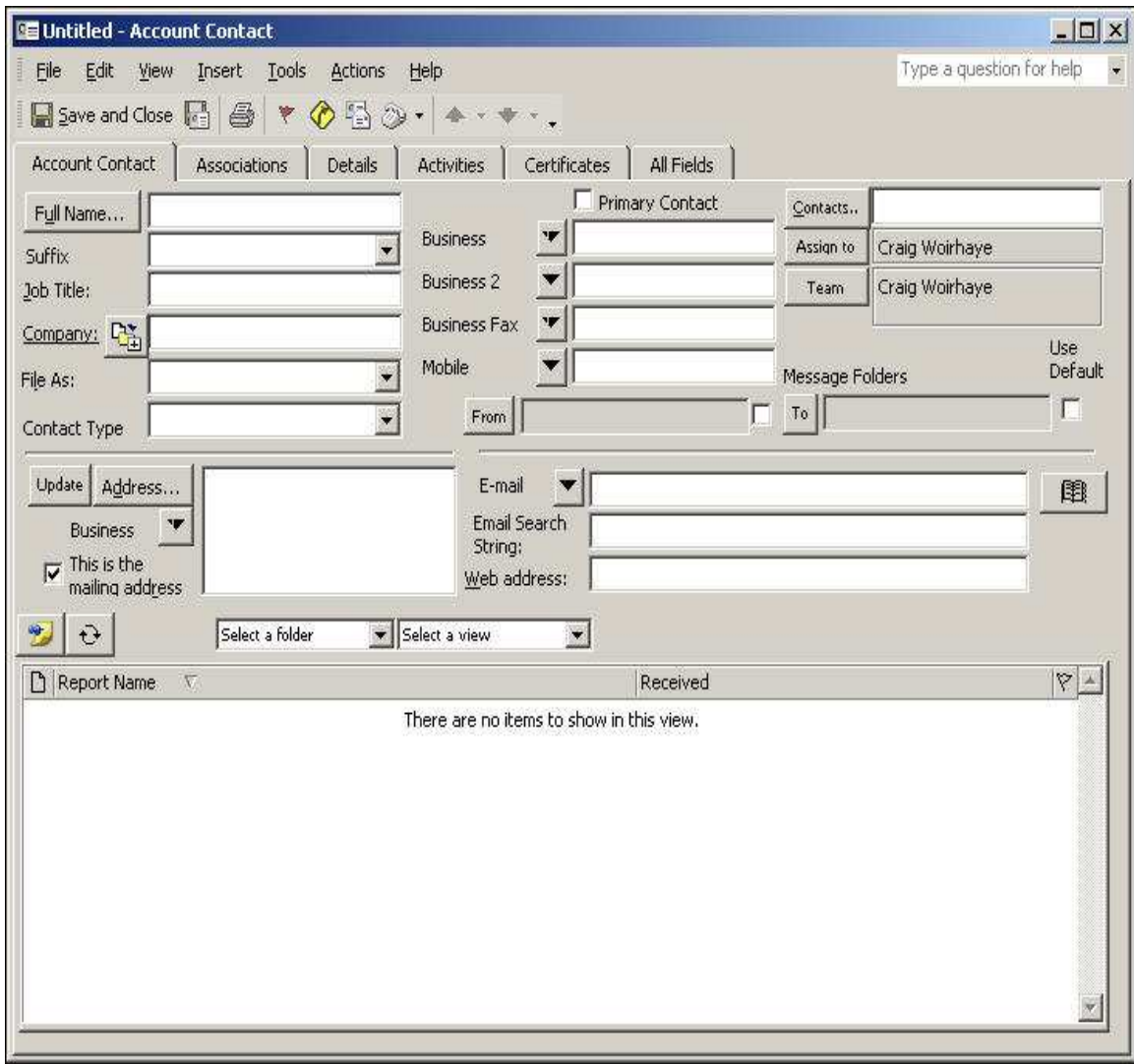
### Contact Management

SalesOutlook builds on the standard Outlook contact form to allow the viewing of all important information required when dealing with your contacts.

From the Account Contact form, SalesOutlook users are able to create and access notes, tasks, email messages, linked documents and more, all from one easily accessible screen.

Because SalesOutlook is built natively into Outlook, all of the features the user is accustomed to, such as scheduling new activities, meeting requests, creating email messages and attaching documents can be easily achieved from the Contact's record.

SalesOutlook enables users to become more efficient and productive by providing them with all of the information they need in one place!



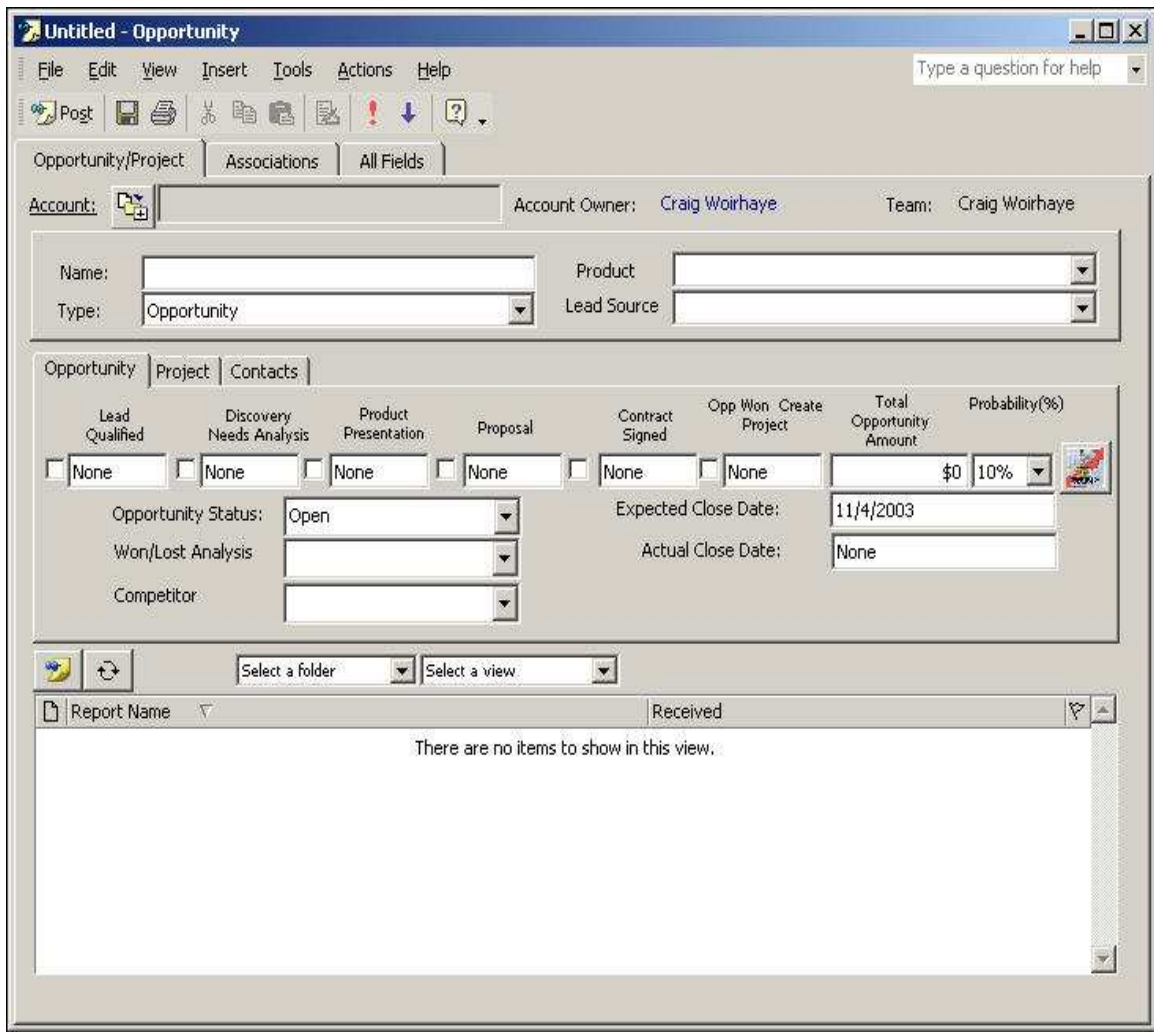
**Figure 2:** SalesOutlook – Account Contact Window

### Opportunity Management

Every organisation needs to identify opportunities to sell its products and services to prospective and/or existing customers. SalesOutlook simplifies the management of opportunities by providing the means to efficiently track every opportunity through each stage of the sales process.

An opportunity can be created in different ways, for the account as a whole, or from a contact record, as when dealing with an organisation, you will nearly always be dealing with a specific sales contact.

SalesOutlook's Opportunity Management works using a six- stage sales process. As the opportunity progresses through the sales process, the user will reach particular milestones in the process, at which stage they will tick the box for the appropriate milestone achieved and will be prompted to add notes to ensure a complete history is recorded. All details are tracked and dated, such as customer meetings, emails, notes etc, for each stage.

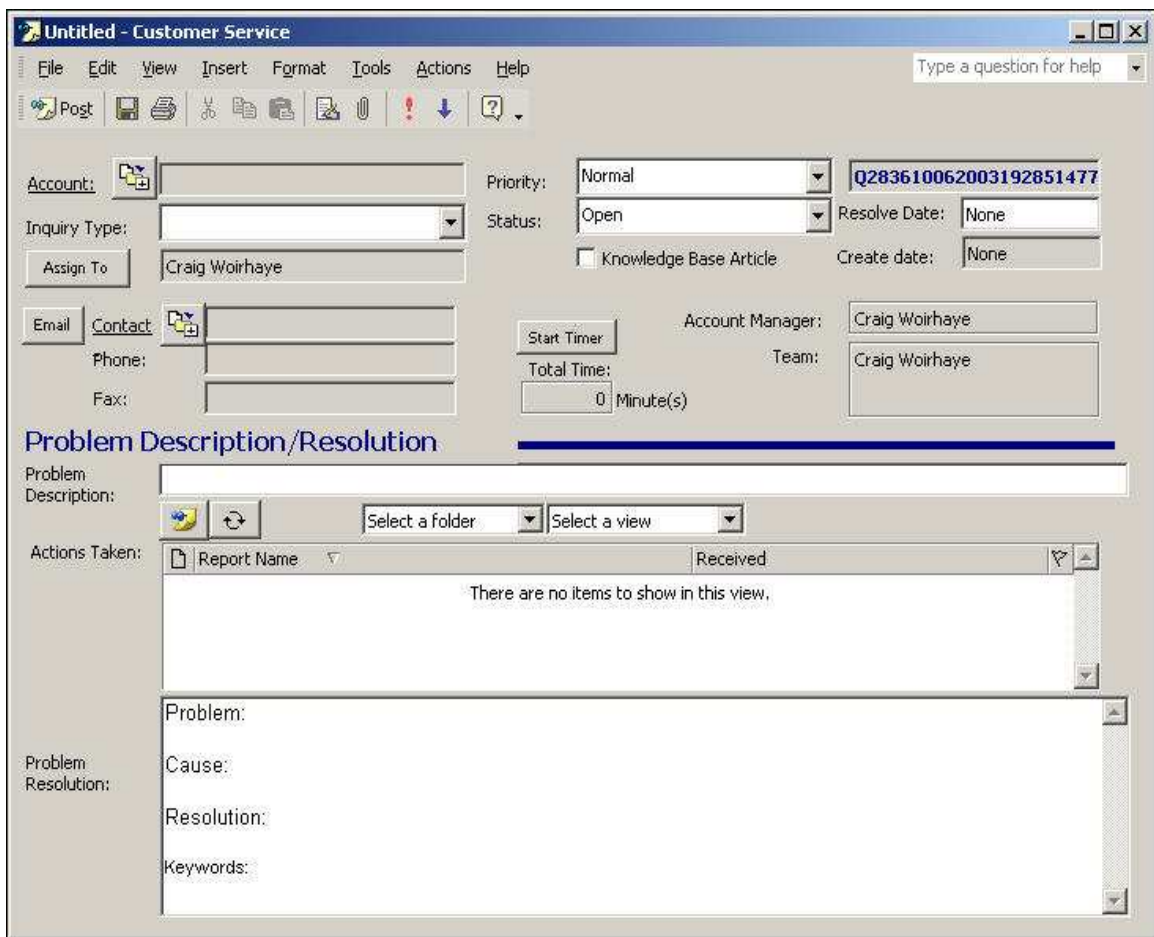


**Figure 3:** SalesOutlook – Opportunity Window

### Service Management

Using the SalesOutlook Customer Service Management features, users are able to manage all manner of enquires such as support, returns or customer service interactions. These can be entered into a searchable database and tracked through to resolution, then used to build a knowledgebase. By creating this easily accessible information throughout the service management process, any user can easily inform the customer of the status of their enquiry at any stage through the process. This ensures that if any team member is away from the office when an enquiry is made, another colleague can view a complete history of the enquiry and keep the customer informed of the status of his enquiry.

Additional features include the ability to determine the amount of time each stage has taken to resolve the problem, using the integrated stopwatch feature incorporated within the Service Management screen.



**Figure 4:** SalesOutlook – Customer Service Window



This document is intended to give a brief overview of the power and flexibility of SalesOutlook which provides many other features, such as Team Selling, Document Management, Email Marketing, and Pocket PC or PDA integration, as well as other tools to enable technology to be used to make your business run more efficiently.

The easiest way to determine the suitability of SalesOutlook as the tool of choice within your organisation is to have a chat with one of our team members at Nouveau Solutions Ltd, where you can discuss your requirements in more detail and arrange for an online demonstration to cover your specific needs.

SalesOutlook is infinitely customisable, so if there is something that is not available as standard, it can be created quickly and efficiently to satisfy any of your business needs

### **Requirements**

For a multi-user environment, Microsoft® Exchange Server is required. SalesOutlook supports Microsoft® Exchange Server 5.5, 2000 and 2003. We recommend Exchange 2000 or higher due to its built-in support for full-text indexing, scalability and reliability, and for its XML-based Web Store

### **System Requirements**

As a single user system, SalesOutlook requires a PC running Microsoft® Office 2000 or higher. In order to use SalesOutlook