

# Discover CRM Version 6.03

The much anticipated Prospectsoft CRM Version 6.03 has now been released, so there are plenty of reasons to get excited!



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## Three Fantastic Solutions ...



CRM Solutions



eCommerce &  
Content Management



Email Marketing

## ...One Ultimate Business Growth System

With the introduction of our All New Email Marketing system, major enhancements to traditional CRM and Accounts integration functionality and significant updates for eCommerce customers, Version 6.03 is now the Ultimate Business Growth Solution.

Each solution can be implemented on its own or integrated together in any combination.

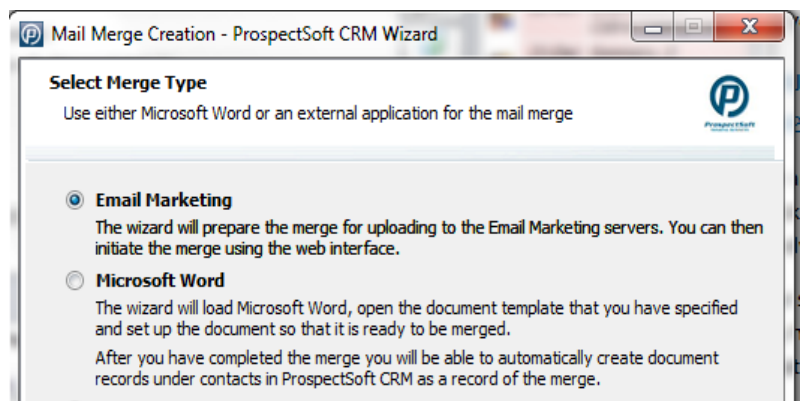
Any business that really wants to maximise growth, can benefit from all three solutions, all based around the solid ProspectSoft CRM core database, working in harmony to make sales and service customers.



## New Email Marketing...

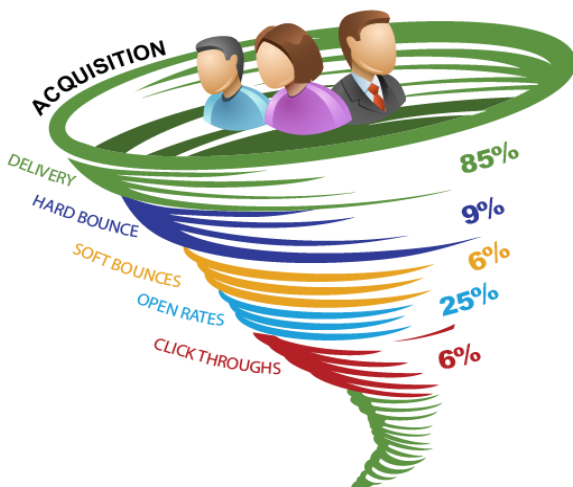
### Select target audiences from your Accounts & CRM data ...

The new Campaign and Mail merge capabilities in 6.03 allow you to select data from your CRM system, filtering your target list by demographic data, by sales history, by account type, by contact role and preference, etc. And once selected, you can still perform traditional print or email mail merges. However a brand new option for 6.03 allows the target audience to be uploaded to a powerful hosted email marketing solution.



### Send great emails that *get through*...

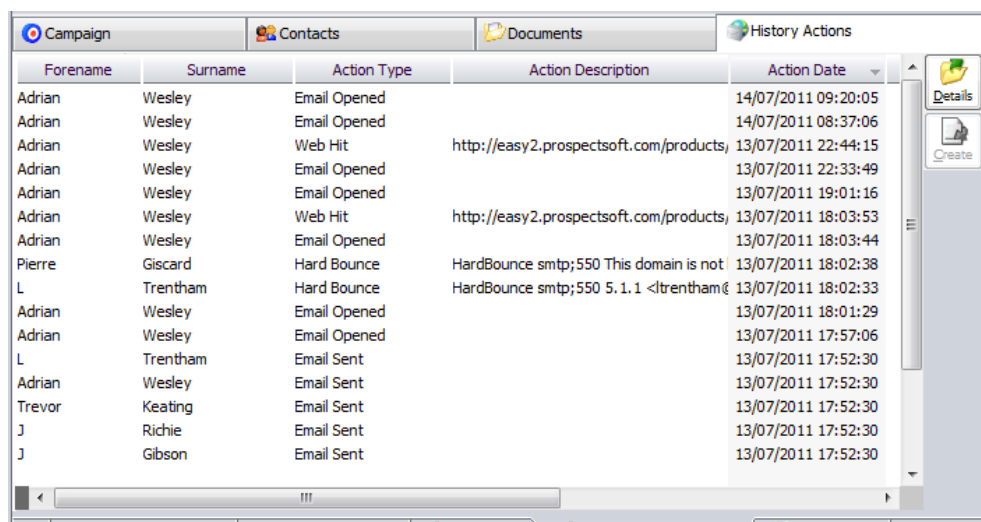
Communiqator, ProspectSoft's chosen email marketing partner are experts in email marketing technologies and best practice. With their hosted solution, the very latest techniques and tools, such as IP recycling and SPAM scoring, are used to deliver your email to the right person - without it being diverted via a dreaded SPAM filter. Their design tools and best practice templates, along with clever preview tools will help you generate emails that users want to open and want to read.



## But best of all...your CRM system will track the email sending, opening, click-through's and survey results.

Just imagine making a marketing call, or going on a sales visit and knowing exactly which emails were read, and which links were clicked. You would know that "Fred" had read the article about your new range or products and that "Wendy" had clicked through to see how much they might save in your winter promotion.

Or being able to tell your sales team to focus their efforts on the 300 customers who have already shown interest in product X (by having clicked through and read an article on it) rather than blindly calling all 10,000 people in your database.



Forename	Surname	Action Type	Action Description	Action Date
Adrian	Wesley	Email Opened		14/07/2011 09:20:05
Adrian	Wesley	Email Opened		14/07/2011 08:37:06
Adrian	Wesley	Web Hit	http://easy2.prospectsoft.com/products	13/07/2011 22:44:15
Adrian	Wesley	Email Opened		13/07/2011 22:33:49
Adrian	Wesley	Email Opened		13/07/2011 19:01:16
Adrian	Wesley	Web Hit	http://easy2.prospectsoft.com/products	13/07/2011 18:03:53
Adrian	Wesley	Email Opened		13/07/2011 18:03:44
Pierre	Giscard	Hard Bounce	HardBounce smtp;550 This domain is not	13/07/2011 18:02:38
L	Trentham	Hard Bounce	HardBounce smtp;550 5.1.1 <ltrentham@	13/07/2011 18:02:33
Adrian	Wesley	Email Opened		13/07/2011 18:01:29
Adrian	Wesley	Email Opened		13/07/2011 17:57:06
L	Trentham	Email Sent		13/07/2011 17:52:30
Adrian	Wesley	Email Sent		13/07/2011 17:52:30
Trevor	Keating	Email Sent		13/07/2011 17:52:30
J	Richie	Email Sent		13/07/2011 17:52:30
J	Gibson	Email Sent		13/07/2011 17:52:30

Just imagine designing a new campaign – email, telemarketing, letter etc. and being able to select data based on previous spend patterns, customers who bought X but not Y...and those who previously clicked on a relevant email last month.

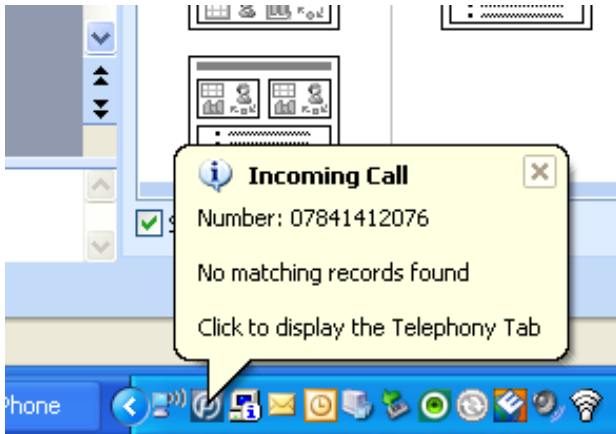
## Real bottom-line ROI

It's not hard to see how integrated email marketing can help to sell more product and service with lower costs to you. It allows you to very quickly identify the right targets – targets who have already shown interest – and spend your precious sales resource talking to these customers first.

## And...Best of all...Easy Email Marketing.

For those new to ProspectSoft solutions and wanting to get started with Email Marketing, the new Easy Email Marketing package can be purchased and installed without any pre-existing CRM solution. With a clear focus on Email Marketing integrated to existing accounts sales ledgers and sales history, Easy Email Marketing can be up and running, very cost effectively, in a matter of hours. And Easy Email Marketing customers can of course add to their system as required with more CRM, e-Commerce or Web Portals etc.

## New Telephony Solution



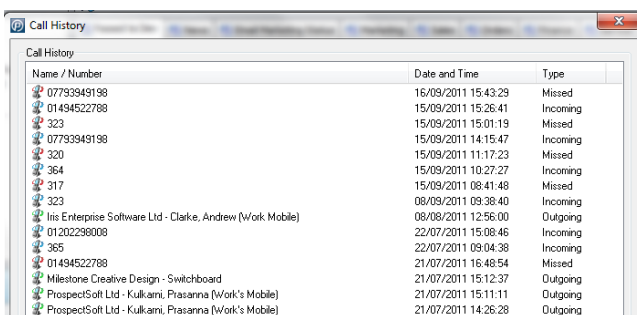
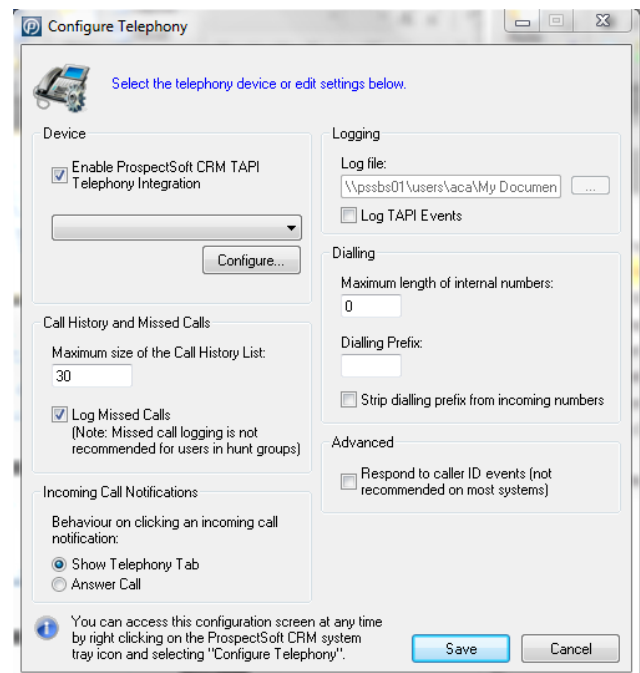
### A new interface

With the new telephony solution in v6.03 it's easier to see who's calling and easier to answer (or not). Whatever application you are currently using, when your phone rings, an unobtrusive popup will give you the incoming number and, if found in the database, who exactly is calling.

### A new back-end

The back-end of the telephony solution has also been substantially revamped.

With new options to configure the telephony for different phone systems, it is easier than ever to integrate the ProspectSoft telephony system with your telephone switch.

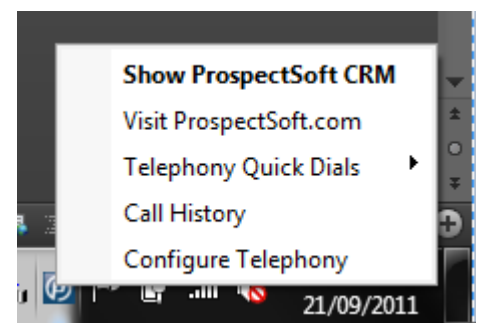


### Call history and missed call logging

Even if you do miss a call, don't panic, all calls are available via the ProspectSoft call log. All incoming, outgoing and missed calls are logged and it's just a button click to redial any number in the log.

### More on the new system tray

If all that isn't enough, the new ProspectSoft system tray delivers even more. Right clicking on the system tray icon opens a popup menu with options including access to the call history, but also the ability to configure quick dial numbers. The system tray is also an extendable system, so look out for more system tray features in future versions and plugins.





## Quotation and SOP Enhancements

### Cost price displayed in the purchase currency and quotation currency

When quoting customers for products, especially in tighter economic times, a sales person often needs to know the cost of the product being quoted and hence the potential for negotiation. Previous versions of the CRM quotation engine provided the product cost, but the quote line now has several important new features:

1. The quotation currency is clearly shown in the bottom left of the quote line window
2. The selling price is also labelled with the quotation currency – (EUR) in this case
3. The cost price, is shown in both the default purchase currency as before (£2.70 in this case)
4. The cost price is also shown in the quotation currency (EUR 3.80 in this example) which is important in helping the sales person to know exactly how much Euro discount might be given.

The screenshot shows the 'Quote/Order Line' window for a product '100W Pearl Light Bulb, BA - 4 Pack'. The window displays the following information:

- Stock Code:** BULB-BA-PE-100W, **List Price:** £5.11, **Pack Type:** Standard, **Units:** Each
- Item Description:** 100W Pearl Light Bulb, BA - 4 Pack, **Cost Price:** £2.70
- Line Description:** 100W Pearl Light Bulb, BA - 4 Pack, **Quantity:** 0
- Due Date:** 00/00/0000, **Warehouse:** (empty), **VAT Code:** 1, **VAT Rate:** 17.50%
- Line Sequence:** 1, **Alternate Reference:** (empty)
- Sell Price (EUR):** 7.20, **Pre-Disc Value:** 0.00
- Pre-Disc Markup:** 89.47%, **Post-Disc Markup:** 89.47%, **Line Discount:** .00%, **(~Disc. Price):** 7.20, **Discounted Value:** 0.00
- Cost Price (EUR):** 3.80, **Cost Price:** 2.70, **% Line Margin:** 47.22%, **Line Margin:** 0.00
- Extended Desc:** (empty), **Internal Notes:** (empty), **Stock Levels:** (empty), **Sales History:** (empty), **Quote History:** (empty), **Grouping:** (empty)

Buttons at the bottom: Save and new, OK, Cancel, Delete, Help.

### Buffering cost prices against exchange rate losses

Showing the Euro equivalent of a Sterling cost price is indeed useful, but of course this becomes less helpful if the exchange rate changes substantially before the order is placed, delivered, invoiced and paid. E.g, in the previous example, the sales person might discount down to EUR 3.90, believing that this still represents a small profit. But, by the time the product is purchased and sold, the same product might cost EUR 3.92 (say), simply due to exchange rate changes. Unfortunately, most accounting systems don't hold a future rate.

The screenshot shows the 'Quote/Order Line' window for the same product '100W Pearl Light Bulb, BA - 4 Pack'. The window displays the following information:

- Stock Code:** BULB-BA-PE-100W, **List Price:** £5.11, **Pack Type:** Standard, **Units:** Each
- Item Description:** 100W Pearl Light Bulb, BA - 4 Pack, **Cost Price:** £2.70
- Line Description:** 100W Pearl Light Bulb, BA - 4 Pack, **Quantity:** 0
- Due Date:** 00/00/0000, **Warehouse:** (empty), **VAT Code:** 1, **VAT Rate:** 17.50%
- Line Sequence:** 1, **Alternate Reference:** (empty)
- Sell Price (EUR):** 7.20, **Pre-Disc Value:** 0.00
- Pre-Disc Markup:** 83.67%, **Post-Disc Markup:** 83.67%, **Line Discount:** .00%, **(~Disc. Price):** 7.20, **Discounted Value:** 0.00
- Cost Price (EUR):** 3.92, **Cost Price (GBP):** 2.70, **% Line Margin:** 45.56%, **Line Margin:** 0.00
- Extended Desc:** (empty), **Internal Notes:** (empty), **Stock Levels:** (empty), **Sales History:** (empty), **Quote History:** (empty), **Grouping:** (empty)

Buttons at the bottom: Save and new, OK, Cancel, Delete, Help.

Furthermore, whatever future conservative rate you might set for converting Sterling costs into Euro's, you would want to apply a rate which is conservative in the opposite direction for products bought in Euro's and sold in Sterling.

The new Buffered Costs solution in ProspectSoft CRM is designed to meet this challenge head-on. In this example, you can see that the EURO cost is now shown as EUR 3.92, even though the sterling cost (the actual purchase currency) is still £2.70.

This "conservative" Euro cost is a result of switching on the optional buffered cost system, and defining conservative or buffered exchange rates. These rates can be independently defined between any currencies (i.e. with a spread between Euro -> sterling and sterling -> Euro) and without having to be calculated via the home currency (i.e. even though the home currency might be sterling, you can still define a Dollar->Euro rate for when you are quoting in Euro's for products that are purchased in Dollars).

From Currency	To Currency	Multiply	Rate	Exchange Rate Result
Euro	Sterling	<input type="checkbox"/>	1.3000	1 x Euro = 0.7692 x Sterling
Euro	US Dollars	<input checked="" type="checkbox"/>	1.2000	1 x Euro = 1.2000 x US Dollars
Sterling	Euro	<input checked="" type="checkbox"/>	1.4500	1 x Sterling = 1.4500 x Euro
Sterling	US Dollars	<input checked="" type="checkbox"/>	1.2000	1 x Sterling = 1.2000 x US Dollars
US Dollars	Sterling	<input type="checkbox"/>	1.4000	1 x US Dollars = 0.7143 x Sterling
US Dollars	Euro	<input type="checkbox"/>	0.9000	1 x US Dollars = 1.1111 x Euro

Finally, to help sales staff consider the margin and mark-up of any given quotation, the new Margin Analysis tab is enabled along with buffered costs and shows the markup/margin for each line in the quotation.

Product	Qty	Each	Discount	Sales Value	Cost Price	Cost Value	Markup	Line Margin
W Pearl Light Bulb, BA - 4 Pack	1	7.20	0.00%	7.20	3.92	3.92	83.67%	3.28
<b>Totals:</b>				7.20		3.92		3.28
<b>Overall Discount:</b>			0.00%	0.00				
<b>Grand Total:</b>				7.20		3.92		3.28

If you don't need buffered costs, and don't turn it on, then there is no extra complexity, but, for any business regularly quoting future contracts in different currencies, with products purchased in multiple currencies, buffered costs may be just what you need to ensure a profitable business.

## Enhanced Delivery Address Options for Sales Orders

When confirming a sales order, it is now easier than ever to choose the right delivery address for the order, without necessarily having to type the whole address manually. The new “deliver to” options allow users to select any division or any contact address from the whole CRM database.

## Create CRM Records from Ledger Imports

Opco	Ledgerid	Name
Z	STRE01	Streetlight Town Lighting Ltd
Z	STRED1	Streetlight (Manchester)
Z	STRED2	Streetlight (Birmingham)
Z	TAYL01	Taylor Electrical Contractors
Z	TRIG01	Trigra Electrical Limited
Z	UNDE01	Underground Cable Ltd
Z	VICT01	Victor Lighting Limited
Z	VICT02	Victory Data Limited
Z	WESS01	Wessex Cable Management
Z	WEST01	West Link Security

In a traditional CRM implementation, any new customer will have existed in the CRM database long before any order is taken. As such when an order is taken, the sales ledger will be created from the CRM record. However, in a purely email marketing, or purely e-Commerce solution, it may well be that new customers are first setup in the accounts system and are then e-marketed to, or are then able to buy spares and accessories online.

To facilitate these scenarios, a new “missing customers” tab in the accounts import can create CRM company, division and contact records for any sales ledgers that don’t already have a matching CRM division record.

This new feature is also useful in brand new CRM implementations where the main source of CRM records are the existing sales or purchase ledger records.

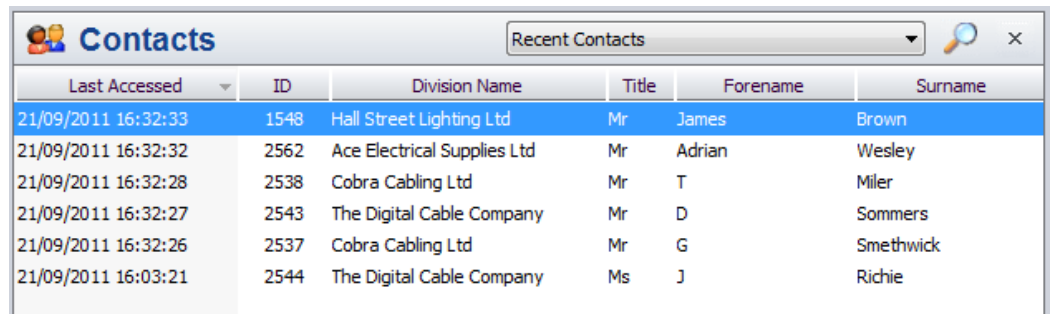
## More searching Capabilities

### Recent Records

“Oh!...that customer I spoke to earlier...that quote I did yesterday...”

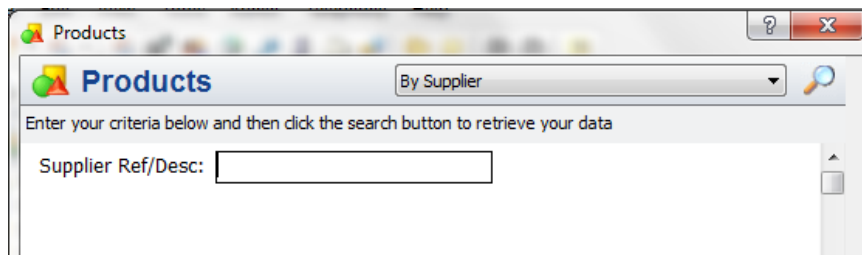
All object types in the CRM (company, division, contact, lead, problem,

quote etc) now have “recent” searches that provide the user with quick and easy access to all the recently opened records of that type. Just open a contact list say, and choose “Recent Contacts” from the drop down list to see all the contacts that you have recently accessed, then double click to re-open any record.



Last Accessed	ID	Division Name	Title	Forename	Surname
21/09/2011 16:32:33	1548	Hall Street Lighting Ltd	Mr	James	Brown
21/09/2011 16:32:32	2562	Ace Electrical Supplies Ltd	Mr	Adrian	Wesley
21/09/2011 16:32:28	2538	Cobra Cabling Ltd	Mr	T	Miler
21/09/2011 16:32:27	2543	The Digital Cable Company	Mr	D	Sommers
21/09/2011 16:32:26	2537	Cobra Cabling Ltd	Mr	G	Smethwick
21/09/2011 16:03:21	2544	The Digital Cable Company	Ms	J	Richie

### Product Item Supplier Searches



Products

By Supplier

Enter your criteria below and then click the search button to retrieve your data

Supplier Ref/Desc:

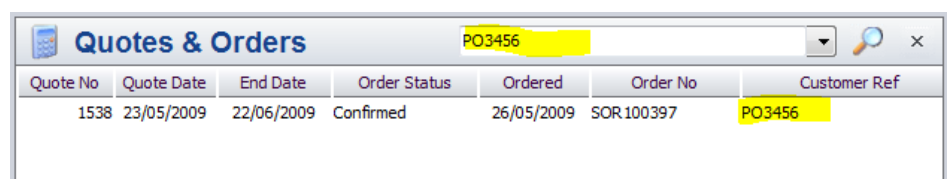
When searching for products, particularly when adding products to a quotation or order, it can be useful to search using the supplier reference or description. Perhaps your customer has been looking at a

supplier catalogue, or perhaps responding to a manufacturers promotion – or maybe your staff know some of the products by supplier reference. Either way, CRM users can now search by the supplier codes and descriptions as well as your own codes and descriptions.

### Customer Reference included in the Quotes and Orders quick search

No matter how much we might like them to, customers don't usually record or remember our order or quotation

references. But the updated Quotes & Orders quick search now includes the searching of customer references too.



Quote No	Quote Date	End Date	Order Status	Ordered	Order No	Customer Ref
1538	23/05/2009	22/06/2009	Confirmed	26/05/2009	SOR100397	PO3456

### All the little bits...

We really could go on, and on, and on about the enhancements in 6.03. From the sales ledger price list/band and discount showing on the summary tab for quick reference, to alerts for backups not running, to improved Urgent Message performance and more, there are over 150 unique enhancements and updates in version 6.03. There is certainly some great functionality or important fixes for everyone. We love it!