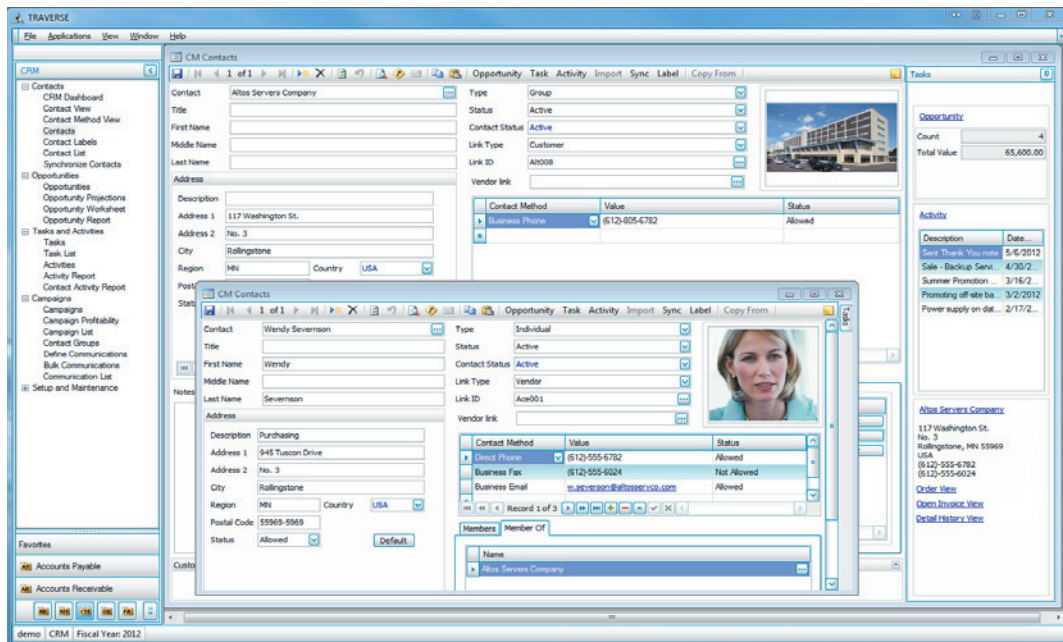


CRM - Customer Relationship Management

Sales opportunities happen anywhere and everywhere, so you need to have critical customer information at your fingertips wherever opportunity finds you. TRAVERSE 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 customers.

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



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

- Deploy TRAVERSE 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, and analyze your campaigns by optionally assigning values and references

Contacts

- Link to TRAVERSE customers, vendors, and employees
- Establish relationships between contacts, such as employees within a company or corporate structure
- Import, export, and synchronize contact information
- Attach unlimited documents and files
- Opt-out settings for individual contact methods
- Access orders, history, and other information in TRAVERSE

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

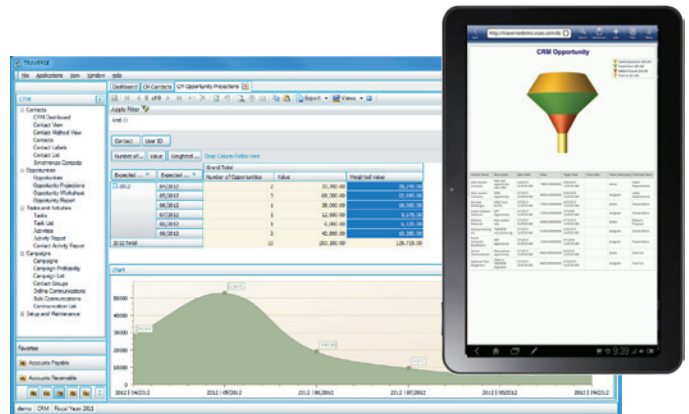
- Obtain campaign analysis reporting, including response count and value
- Interface to TRAVERSE Project Costing for cost tracking
- Attach unlimited documents and files

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 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.