e-Synergy: Customer Relationship Management

" What most companies don't realize is that their customers are actually part of their organization, not a separate concern."

It's a fact that the most successful companies not only put customers first, but put customers at the center of their organization. The key is to go beyond the sales cycle in order to recognize and emphasize the many relationships your customers have not only with your own company, but with your partners, vendors and consultants.

e-Synergy®, from Exact Software™, is a Web-based business management solution that enables customer management as a part of your entire business. Your clients, business partners, employees and vendors are automatically associated to one another and to all relevant and mission-critical business transactions. Your financial, sales and product support information is available immediately, online, and is linked to any project, initiative or event that affects your customer. Everyone in your company who works with customers or prospects are under your control and on the same page, at any time, from anywhere in the world.

Empowering your customers through self-service and intelligence access

Exact e-Synergy fortifies your customer and partner base by allowing them to access and act on information that pertains to them, at every step of every business process. Financial, sales and customer service intelligence is centralized in one database, providing knowledge that is traditionally spread across the organization or is inaccessible. This integration allows your company to realize significant and immediate return on investment while fostering investment in your customers. e-Synergy puts your customers at the center of your business, turning them into an interactive force.
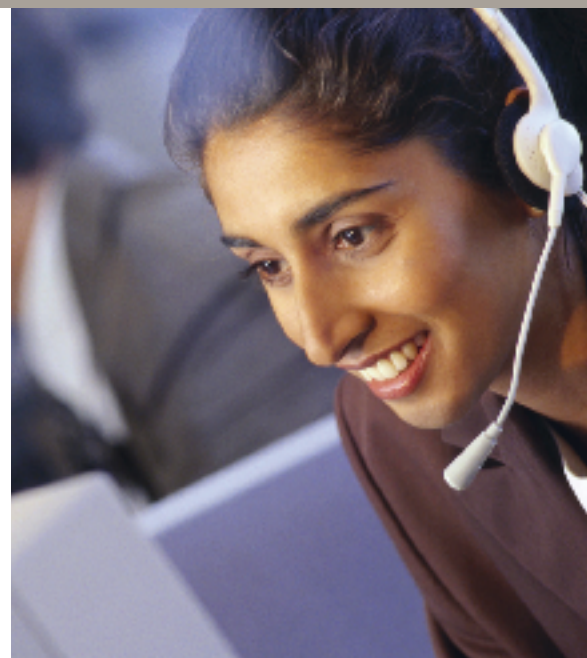
e-Synergy Customer Relationship Management (CRM) business benefits:

- Complete teamwork and rapid communication between you, your customers, partners, suppliers and vendors through integrated portals
- Secure logins that provide immediate access to all customer activity from anywhere, at anytime, worldwide
- Recognition of customer problems or issues before they happen
- Centralized, detailed view of each customer, including workflow, financial transactions and support issues
- Ability of customers and partners to actively and privately manage their own accounts
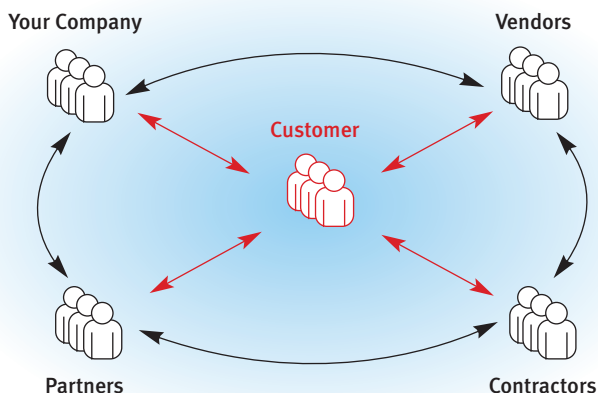
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With e-Synergy, nothing is left on the table when it comes to your corporate relationships—a complete CRM toolset provides both broad-based views and specific information about everything from product updates, sales standings, customer support issues and any related documents.

Two-way Workflow Management: With e-Synergy, real-time views of the issues and actions by both you and your clients enable consistent, up to the minute insight into both the details as well as the big picture—an open, transaction-based system.

Customer-specific Reports and Statistics: Built-in analytics are the only way to know what your customers are thinking and to respond to their issues quickly and effectively. e-Synergy's native real-time analysis tools, reports and ad hoc querying can help you recognize issues before your customer does.

Financial Management: All customer-related financial transactions are automatically associated with their account information, including outstanding payments or marketing co-op amounts, making them easily accessible to your sales reps and remote offices when needed.

Document Management: By electronically storing all documents, e-Synergy provides an automatic, accessible audit trail of all paperwork associated with your customer.

e-Synergy manages and associates all relationships that affect your client base.
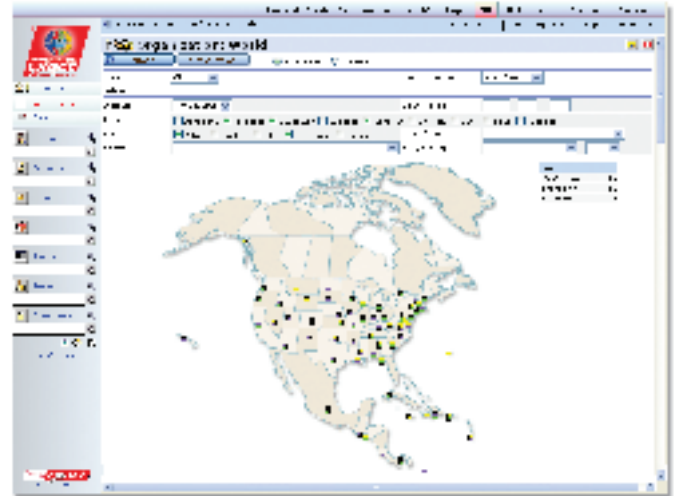
e-Synergy CRM features and functions:

- Secure portal for customer participation
- Separate customer and partner portals
- Storage of all sales quotes, contracts and workflow
- Tracking of individual account financial transactions
- Association of accounts to assets, documents or projects
- Management of marketing campaigns
- Integration with Microsoft Exchange and Outlook

Integrated Portal Technology: Built-in Web portals provide ongoing and active conversations with all of your customers, partners and vendors. Secure private logins allow for one-to-one client interactions, all without having to add IT staff to maintain extra Websites or pages.

By bringing together the people, processes and knowledge that matter most to your business, e-Synergy creates an accurate, up-to-the-moment view of your organization's personnel, finance, workflow, documents and asset information, enhancing decision-making, analysis, scenario planning, and ongoing management across your entire business. You can't afford to have any of your corporate relationships go unnoticed, because they will be the first to notice.

For more information about e-Synergy, please contact your Exact Software business partner or account representative today, or visit www.exactamerica.com/esynergy.