



CLIENT RELATIONSHIP MANAGEMENT

Lotus Notes Solutions

Free Licenses with our Success Agreement™

SPECIAL POINTS OF INTEREST :

- > Create, manage and share all critical client information
- > Integrated scheduling writes to group and personal calendars
- > Create, manage and share all client activities
- > One customizable Lotus Notes database
- > Mailing Labels
- > Transfer e-mails from your mail file automatically



Prospects/Clients/Scheduling/Activities

Imagine using one database to create, manage, and share client information and activities. Imagine replicating that information to your laptop so you can work anytime and anyplace, regardless of whether you are connected to a server. Imagine collaborating with your team within the same database.

SGA's CRM provides all of these features and functions and much more. With our single-entry technology, you can handle multiple tasks at once. For example, when you schedule a meeting with a client, a calendar entry is created on the integrated shared calendar and written to your personal

calendar. The client's contacts information is automatically added to your personal address book. If you have a BlackBerry, the calendar entry and contact are synchronized.

You can send e-mails directly from the system and transfer e-mails from your mail database. All client information, activities, documents and tasks are at your fingertips in reverse-chronological order.

For document management needs, store all relevant files (Word, Excel, Power-Point) within the database.

Create mailing labels on the fly for the contacts you select. The mailing labels are created in Word so you can customize them as you wish.

Business Partner relationship management, Event management and mass e-mailing capabilities are built-in.

Invite others to a discussion or simply respond to any information with our integrated discussion and response hierarchy

OPTIONS :

Prospect Management

Business Partners

Shared Library

Timesheets

Quote Management

Event Management

Mass E-Mail Capability

