

Surado CRM – A Best Buy for SMBs!

Regardless of industry, a key concern is not the *lack of* information collected, but rather *accessibility* to that information. Surado CRM helps cut through information silos within an organization, leveraging current technology investments to provide the right information to the right people at the right time.

The core Surado CRM suite combines Contact & Account Management, Sales Automation, Marketing Automation and Customer Service/Help Desk features to offer an unprecedented level of power and flexibility for organizations looking to move beyond simple, under-powered solutions.

INCLUDES

- Surado CRM Suite:
 - Contact & Account Management
 - Sales Automation
 - Marketing Automation
 - Customer Service / Help Desk
 - Dashboard Analytics
 - Interactive Workflows
 - Organization Charts
 - Built-In Project Management

CONTACTS & ACCOUNTS

- Customizable Dashboards
- Workgroup Calendaring & Scheduling
- To-Do's List
- Integrated E-Mail and Fax*
- Resource Scheduling
- Expense Tracking & Reporting
- Attach Documents
- Integration with Microsoft Office
- Synchronization with Palm™ PDAs
- Activity Timer
- Automated Business Triggers
- Project Management
- Knowledge Base
- Global Search
- Graphical Workflows
- Analytics & Reporting

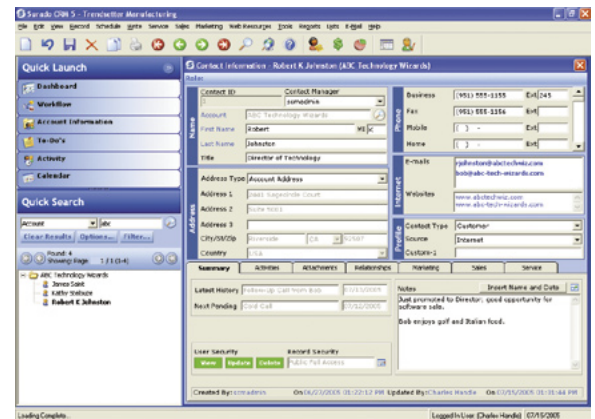
SALES AUTOMATION

- Opportunity Management
- Forecasting & Pipeline Analysis
- Sales Workflow Automation
- Lead Generation & Routing*
- Team Selling & Management
- Dashboard Analytics
- Inventory & Quotes
- Competitor Intelligence
- Source Tracking
- Lookups & Groups
- Automated Business Triggers
- Productivity Analysis
- Sales Stage Tracking
- Partner Opportunity Management*
- Win/Loss Analysis
- Literature Fulfillment
- Cross-sell and Up-sell Analysis
- Web Resources for Research
- Back-Office Integration
- Analytics & Reporting

Contact & Account Management

Record detailed information for customers and vendors, both at the company-level (Accounts) and for individuals (Contacts). Empower representatives to provide a high level of customer service with a complete record of customer communications, including phone calls, e-mails, meetings and presentations. Easily review upcoming activities, sales opportunities, attached documents and integrated information from other databases, all from a comprehensive Main Contact Screen.

Surado CRM includes fully-integrated scheduling and task management to track both internal and customer activities, including multiple participants and resources, with pop-up reminders and customizable To-Do's and Calendars.



Sales Automation

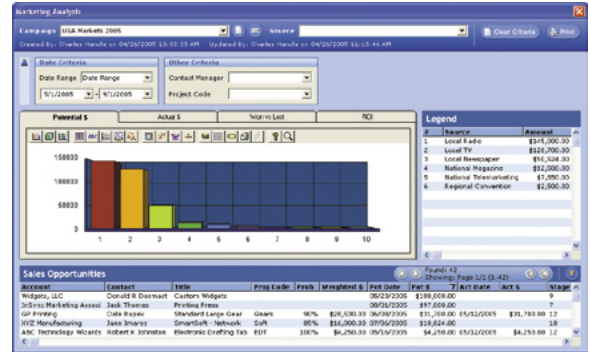
Manage customer accounts throughout the sales cycle. Capture and import leads, distribute them and create automated follow-up reminders for qualification. Track detailed opportunity information, including competitor information, and create customized sales stages, based on projects or product lines. Use the powerful Opportunity Management Sales Funnel to forecast future revenue, and target the most profitable accounts.



Surado CRM includes an integrated quoting system and fully-featured inventory and part management. Create quotes and print, e-mail or export them, or merge information into Microsoft Word or Excel.

Marketing Automation

Using Surado CRM's comprehensive marketing campaign tools, you can build lasting and profitable customer relationships by executing effective and timely campaigns over both traditional and electronic channels. Create targeted e-mail campaigns for automated execution and follow-up and use integrated data mining and contact grouping to optimize multi-channel marketing. Realize significant value and gain lasting competitive advantage through ROI analysis. Track the effectiveness of campaigns, comparing potential and actual responses and sales, and invest your marketing dollars more effectively.



MARKETING AUTOMATION

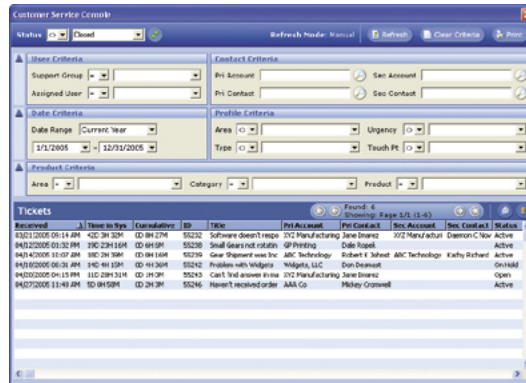
- Campaign Management
- ROI Analysis
- Data Mining
- Capture Leads from the Internet*
- Traditional Leads Importing
- Contact Group Management
- Letter Management

CUSTOMER SERVICE

- Open, Track & Resolve Support Incidents
- Unlimited Support Tickets Per Contact
- Quick View of Support Cycle
- Track Resolution Time & Costs
- Service Level Agreements (SLAs)
- Track Billing Information
- Complete Customer History
- Automatically Convert E-Mail into Tickets
- Return Merchandise Authorizations (RMAs)
- Support Process Automation
- Web-based Customer Self-Service*
- Track Support Productivity
- Graphical Support Dashboard*

Customer Service / Help Desk

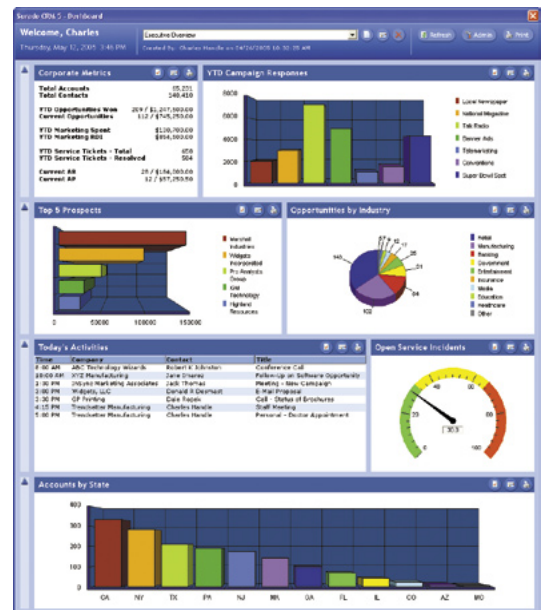
Empower your customer service, help desk or support staff, with an integrated system that not only tracks communications, but provides the comprehensive overview needed to improve customer satisfaction. Track inquiries and issues, build a knowledge base, create contracts and SLAs (Service Level Agreements), and track RMAs (Return Merchandise Authorizations) all directly in Surado CRM. Take advantage of advanced Business Intelligence features to build support rules that automate labor-intensive processes, such as routing and confirmation.



Dashboards

Surado CRM allows the creation of unlimited customized graphical dashboards that can include activity, sales, marketing, customer service and integrated data. Users at all levels can quickly view "snapshots" of critical data in a single comprehensive screen with bar charts, pie charts, funnels, circle gauges and grids.

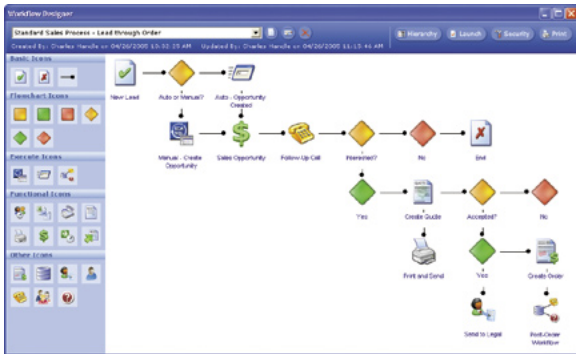
Users can view real-time forecast status, top deals, recent sales activity, view what's in the pipeline, marketing campaign activity, daily to-do's and appointments, performance gauges and more, all in one place, and even drill-down into details and optimize team effectiveness, based on real-time metrics.



*These features may require optional modules, which can be purchased separately.

Dynamic Interactive Workflows

Managers can easily design graphical workflows to help ensure that processes are carried out consistently and efficiently. Users can then access these dynamic workflows to guide them through both customer inquiries and internal procedures. Workflow icons can launch windows and perform functions within Surado CRM as well as launch third-party applications.

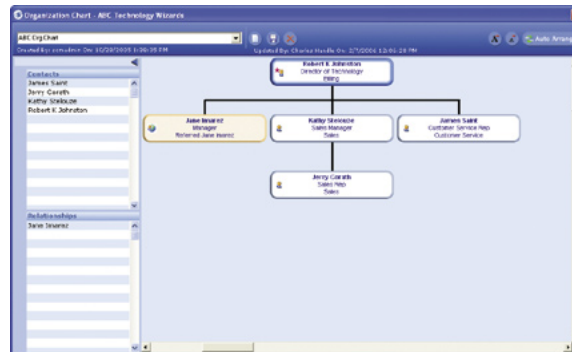


Surado CRM Interactive Workflows are not simply process automation represented in graphical user interfaces. Interactive means users can drag-and-drop objects, create links between multiple objects, and then actually use objects to launch windows or other applications.

Organization Charts

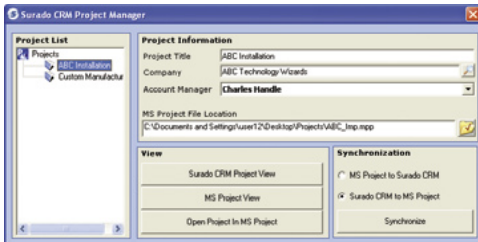
Surado CRM provides users a tool to model the often complex relationships between contacts within an account. In the Organization Chart window, users can see not only basic information like contact names, titles and roles, but also the organization's structure of managers and subordinates.

In addition, relationships can be shown with partners, suppliers, vendors, strategic alliances, etc.



Project Management

Surado CRM includes built-in project management features, including the ability to synchronize records with Microsoft Project. Tasks and sub-tasks can be created. Then activity records can be linked to these tasks, to record more specific information, including times, participants, resources and notes. Existing Project files can be imported into Surado CRM, or new files can be created and managed in Project.



INTEGRATION*

- Enable 360° View of Customers
- Drive Faster Business Decisions
- Eliminate Knowledge Silos
- Reduce Data Redundancy
- Increase Data Integrity
- Real-Time Access to Back-Office
- Minimize Development Costs
- Utilize Industry Standard Technologies
- Increase Efficiency to Maximize ROI
- Seamless Links to Department Workflows
- Data Mining Across Enterprise Apps
- Integration Touch Points:
 - 3rd Party Front-Office Apps
 - 3rd Party Back-Office Apps
 - Custom Business/E-Business Apps
 - Industry-Specific Apps
 - Computer Telephony (CTI)

ANALYTICS & REPORTING

- Customizable Dashboards
- Over 200 Prebuilt Reports
- Custom Fields & Views
- Management Analytics
- Statistical Analysis
- Configurable Graphs
- Ad-Hoc Reporting
- Automated Reporting Module*
 - Schedule Weekly, Monthly or Quarterly Performance Reports
 - Route Scheduled Reports to Designated Users
 - Print and Route other Windows Documents

Product Option Modules

A number of product option modules are available for Surado CRM that extend its power and versatility:

Surado CRM Integration for Microsoft Exchange

The Integration for Exchange module can automatically capture incoming and outgoing e-mail messages, linking them to contacts as history activities, as well as synchronizing contacts and tasks.

Surado Integration Module

The Surado Integration Module (SIM) allows users to view and manipulate data from SQL, Oracle, DB2 and Access databases directly in Surado CRM. Administrators can also create stored procedures to automatically write Surado CRM data into other databases.

Surado CRM Integration for Financial Systems

The Surado CRM Integration for Financials series of modules is designed to allow customers with Surado CRM and either Microsoft Great Plains or QuickBooks to seamlessly exchange data between systems, including customer information, vendor information, inventory, quotes, orders and invoices.

Surado Web Self-Service

Surado Web Self-Service enables organizations to provide Web-based Self-Service options to their clients, for a better customer service experience with reduced costs. Self-Service features include a knowledge base, customer service ticket submission and review and customizable web links.

Surado Web eLeads

With Surado Web eLeads, when clients request information about products and services via a web form, contact records and any necessary activities are automatically created for fast and efficient follow-up.

Surado CRM Web

Surado CRM Web allows remote users to access basic Surado CRM functionality through a Web interface, including contacts, activities, sales opportunities, quotes and customer service tickets.

Surado CRM Fax Server

The Surado CRM Fax Server module allows organizations to dedicate one computer with a fax modem as the fax server. All reports or other documents that are faxed from Surado CRM clients will then be routed and faxed from the designated fax server computer.

Surado CRM Offline with Always-In-Sync™

Surado CRM Offline is a powerful disconnected solution that allows complete access to customer information on the road. Once laptops reconnect to the network, Surado's patent pending Always-In-Sync™ technology automatically synchronizes data both ways in the background.

For more information on these and other Surado CRM product option modules, call **1.800.4SURADO** or visit **www.SuradoCRM.com**.

If you mean
to **PROFIT**,
learn to **PLEASE**. —Winston Churchill

ABOUT SURADO

Surado Solutions, Inc., founded in 1995, is a privately held company that provides a full spectrum of Customer Relationship Management (CRM) products and services. As an emerging innovator in CRM software, Surado is committed to providing powerful, versatile and sensible solutions that help companies know their customers and keep them for life. Surado's CRM Solutions help organizations increase sales, build customer loyalty and reduce costs while providing better customer service. Our CRM solutions serve a wide range of vertical markets including financial services, healthcare, government and manufacturing.

MORE INFORMATION

WWW.SURADOCRM.COM

1.800.478.7236

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