

KEY FEATURES

- 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™ and Pocket PC Devices
- Activity Timer
- Automated Business Triggers
- Project Management
- Knowledge Base
- Global Search
- Graphical Workflows
- Analytics & Reporting

Speed & Accuracy

Surado CRM captures all customer communications in detail, whether through phone e-mail, fax, Internet or personal contact. Empowering your representatives with relevant customer data enables them to provide a high level of customer service.

Comprehensive Customer Information

Users can easily review past communications and upcoming activities, sales opportunities, quotes and purchases, support issues, links to relevant documents and information from back-end systems with Surado CRM's comprehensive Main Contact Screen.

Customizable Dashboards

Empower users with instant access to real-time graphical analytics including activity lists, sale forecasting and statistics, marketing graphs and service gauges. Managers can see a snapshot of corporate metrics, spot potential problems, drill-down to individual records and "push" critical data to employees.

Business Process Manager

Surado CRM provides advanced Business Intelligence features that can be used to streamline labor-intensive processes, such as automated customer responses and follow-ups. Criteria can be easily modified in response to changing business requirements.

Scheduling & Task Management

Surado CRM includes fully-integrated workgroup scheduling and task management features to track activities, participants and resources, including pop-up reminders. Managing to-do lists is easy with sorting and filter options to help ensure that important activities are completed on time.

Integrated Project Management

Built-in project management features help users efficiently organize and track tasks and resources to keep projects on time and within budget. Synchronize with Microsoft Project for advanced analysis and report generation.

Knowledge Base

Surado CRM's centralized knowledge base allows employees to leverage knowledge of company policies, product information and Frequently Asked Questions, to standardize handling, improve response time and shorten ramp-up time.

Workflows

Managers can easily design graphical workflows to help ensure that processes are carried out consistently and efficiently. Representatives can then access these workflows to guide them through the process of handling customer inquiries and internal procedures.

Gain Insight

With Surado CRM's advanced analysis features, both managers and employees can access a range of tools to review and improve productivity. Modify over 200 included reports to fit your business needs, or utilize Crystal Reports® for ad-hoc requirements.

**Deliver fast and accurate
information across your
entire enterprise.**