

ANALYTICS AND REPORTING

KEY FEATURES

- 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

Measure Performance

Empower your employees with tools that enable them to analyze their own performance on a real-time basis, resulting in improved customer service across all touch points. The power to measure performance, not just for a selected few but for all employees, allows them to be more responsive.

Surado CRM provides powerful next-generation business analytics and reporting tools necessary to provide a comprehensive view of your customers. The benefits are faster generation and distribution of reports, more informed decision-making, rapid deployment of changes, increased efficiency and ROI resulting in a reduction in total cost of ownership.

CRM Dashboards

When customers call, your employees need an intuitive system that gives them instant access to the information they need. Surado CRM Dashboards provide graphical analytics including activity lists, sale forecasting and statistics, marketing graphs and service gauges. Instead of having to run a multitude of reports, dashboards provide each member of your team with a comprehensive single view of their responsibilities on one screen.

Managers can see a snapshot of corporate metrics, spot potential problems, drill-down to individual records and “push” critical data to employees.

Comprehensive Prebuilt Reports

With over 200 prebuilt reports offering hundreds of querying and sorting combinations, employees from the CEO to the service agents will be able to quickly identify, execute and review performance across the entire enterprise. Managers will be able to run reports for individuals as well as teams in order to gain insight into business operations.

Powerful Ad-Hoc Reporting

For more advanced users, Surado CRM comes completely integrated with Crystal Reports®, the industry's leading reporting tool. Ad-hoc reporting tools deliver fully customizable and configurable solutions that allow creation of an unlimited number of reports throughout the entire organization.

Management Analytics

In addition to the hundreds of reporting tools available to management, Surado CRM provides a powerful set of features designed exclusively for executives to monitor the health of their business. These tools provide executives real-time global access to contact, account, service, sales and marketing information. With the ever-changing business climate, executives will be able to review consolidated analysis of key metrics in order to better manage the direction of an organizational unit as well as the entire enterprise.

With Surado CRM, both executives and management will be less reliant on IT departments to monitor the state of the business.

Advanced Security

With Surado CRM's advanced security features, administrators define who has access to analytics and reporting tools. This helps ensure that the appropriate person has access to the right set of reporting tools to get the job done efficiently.



Quickly **identify, execute,**
and **review performance** across
the **entire enterprise.**