

## O V E R V I E W

# click your way to better business, or your money back

Whether you're a business owner or involved with management, administration, sales, marketing or support, **primeKey CRM** is guaranteed to make your business life easier.

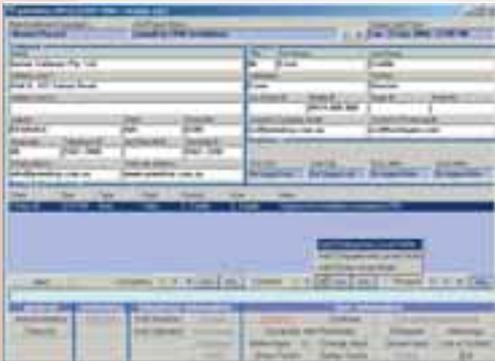
Built on 17 years (since 1987) of customer relationship management/business process experience, **primeKey CRM's** ease-of-use is achieved by automating a core set of processes that are found within all departments of every business. The result is a high productivity software tool that tracks tasks, projects, clients and business opportunities. **primeKey CRM** is not another contact manager! **primeKey CRM** integrates everything you do and provides you with single-click mouse options such as 'set reminder', 'make appointment', 'complete contact', 'delegate' and so on. **primeKey Customer Relationship Management** will make your business life easier. If it doesn't, we'll give your money back.



**primeKey CRM**  
BUILDING COHESIVE MANAGEMENT

## CORE BUSINESS PROCESSES

- 1) Search for a company or contact to obtain some information
- 2) Search for a project to review the current history and possibly take some action
- 3) Set a reminder to call someone back
- 4) Send a general message to someone within the organisation
- 5) Attach a note/document to a company, contact or project/job
- 6) Quickly review the history of a company, contact or project/job
- 7) View all your open tasks in the priority order that you set
- 8) Make, change or delete a normal appointment
- 9) Action multiple tasks for a single contact in a single session without the fuss
- 10) Delegate a project/job/task to someone for follow-up
- 11) Manage and store incoming e-mails effectively
- 12) Make a group appointment, ie:
  - allocate a job to a technician who is on the road
  - make an appointment for a doctor in a surgery that caters for many doctors
  - allocate time for a car bay (from multiple car bays)
  - allocate time to the board room



## PRODUCT DESCRIPTION

### General Task Management

primeKey CRM keeps track of everything you have to do and everyone you have to see – resulting in more efficient use of your time.

### Email Management

Allows you to create e-mails and automatically assign them to a job/project. Incoming e-mails are automatically routed to the specific job/project that it relates to and organising or categorising anonymous incoming e-mails is very easy to do as well.

### Workgroup Collaboration

primeKey CRM has been designed for workgroup collaboration and allows for delegation and calendar sharing. Internal messages can also be sent to an individual role or broadcast to an entire department/group.

### Delegation

The delegation option in primeKey CRM allows you to delegate a task to an individual role within the company or to a department or group. For role delegations, an alert is displayed for the role to indicate an incoming delegation. For department / group delegations, an alert is also displayed, however whoever selects the delegated task first is the one who takes ownership of that task. An optional reminder can easily be set to follow up any delegated task.



### Document Management

primeKey CRM includes very advanced document management functions. These functions allow you to create an unlimited number of document groups with various levels of access. The types of groups that can be created, amongst others, include:

- 1) Literature groups for the salespeople
- 2) Knowledgebase groups for the service department
- 3) Specific groups for the enterprise (general information documents etc)

### Sales

Allows you to keep in contact with clients and call them back when you say you're going to – resulting in better customer service.

### Marketing

Allows you to launch a fully automated marketing campaign with high appointment ratios and low costs. It includes a direct mail marketing module that allows for the management of the sales process, creation of tele-marketing teams, creation of campaign specific documents and assigns different tasks to tele-marketers.

### Service

primeKey CRM allows you to keep the client informed about their job and allows you to easily search by job number. Incoming jobs can even be chosen based on the skill level of each employee.

### Accounts

For debtor collection, primeKey CRM keeps you on top of outstanding debtors and for other general accounting procedures, gives you the same options as management.

### Mobile Workforce Technology

primeKey CRM allows technicians or sales teams to experience the new world of wireless handheld technology for even more efficiencies.

### Managed Security

primeKey CRM is based around the roles within a company. This allows you to accept the default security levels within primeKey CRM or create very strict security levels based on Microsoft Windows 2000/2003/XP COM+ security settings.

### Support Options

primeKey CRM support includes access to an on-line knowledgebase, e-mail support and 30 minutes live support for each license sold.

### Error Reporting

primeKey CRM includes a very sophisticated error reporting mechanism. If an unexpected error occurs, the reporting mechanism allows the primeKey development team to pinpoint the error exactly and correct it in as little time as possible. Should an error occur with primeKey CRM, the programming department guarantees it to be fixed within a 48 hour time frame with the relevant update being posted to the web site.

### Requirements

For a single user install, primeKey CRM requires a minimum of Windows 2000. For a multi-user installation, primeKey CRM requires a minimum of Windows 2000 on the file server and a minimum of Windows 98 on the client workstations.

### Guaranteed Return on Investment

primeKey CRM is GUARANTEED to give you a short term return on investment. If you do not think that primeKey CRM has given you a ROI over a 90 day period then we will be happy to give you your money back for all licences purchased.

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