

LOOKING FOR BUSINESS SOFTWARE THAT'S DE-COMPLICATED?

designed for **QB**
QuickBooks

See system requirements for version information



Sales-Lead Processing
Proposal and Opportunity Tracking
Sales-Order Processing & Fulfillment
Purchasing & Receiving
Customer Service & Scheduling
Inventory Control & Automation

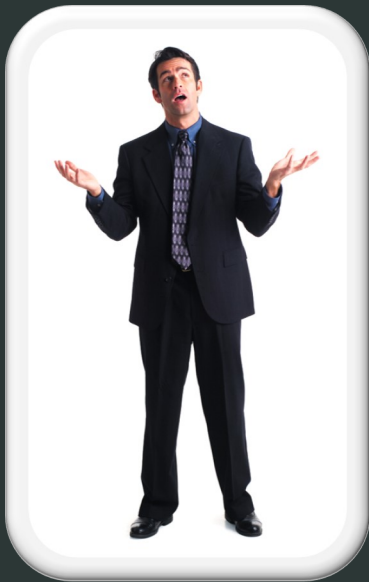
"...it's a total business solution"



STOP ENTERING PROSPECTS AND PROPOSALS DIRECTLY INTO ACCOUNTING!

Why...

Quickbooks™ is a great accounting system, but it's not a **total business solution**. Why bother clogging Quickbooks™ with prospects and proposals that may never order? Our system manages your sales-lead processes using state of the art technology. When a prospect is ready to order, a few clicks sends the information into the accounting system without **any** double data-entry.



"...impressive Sales Automation!"

ENSURE THAT NO OPPORTUNITY IS LEFT UNTOUCHED



FLEXIBLE, POWERFUL SALES AUTOMATION FEATURES

- BULK LEAD IMPORT (XLS, CSV)
- MASS ASSIGNMENT/RE-ASSIGNMENT
- OPPORTUNITY (PIPELINE) TRACKING
- REALTIME SALES QUOTA TRACKING
- BUILT-IN COMMISSIONS
- REAL-TIME INVENTORY STOCK/PRICING
- 20 CONFIGURABLE CUSTOMER PRICE LEVELS
- PROMOTIONAL PRICING & BULK DISCOUNTING
- PDF PROPOSAL GENERATION
- PAYMENT & ORDER PROCESSING
- E-SIGNATURE CAPTURE
- PHONE/EMAIL/FOLLOW-UPS
- DOCUMENT MANAGEMENT
- SALES CALL/MEETING SCHEDULING
- MARGIN/PROFIT ANALYSIS

Simplified solutions for the complexity of business



“...we should start leveraging our technology investment.”

CONNECT THE TECHNOLOGY RESOURCES NECESSARY TO AUTOMATE YOUR BUSINESS WORKFLOW



Magento

channeladvisor

MULTI-CHANNEL INTEGRATION

- ◇ Authorize.NET
- ◇ PayPal/PayFlow-Pro
- ◇ Intershipper
- ◇ Intuit Quickbooks
- ◇ Quickbooks Merchant Services
- ◇ Amazon
- ◇ E-Bay
- ◇ ChannelAdvisor
- ◇ Magento
- ◇ UltraCart
- ◇ EDI Interchange
- ◇ UPS/Fedex/USPS/Canada Post
- ◇ Office-365
- ◇ Google Gmail
- ◇ many more...

PLUG-AND-PLAY CUSTOMIZABLE E-INTEGRATIONS

We've taken care of integrating all of the leading software providers directly into the system for you. Talk to us and let us know which providers you're working with (or interested in), and most likely, they're already on our list.

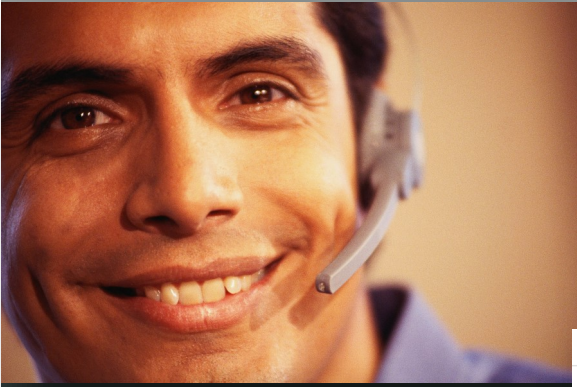
The screenshot shows a software interface with a navigation menu at the top (1-Marketing, 2-Leads, 3-Cycles/Funnel, 7-Scheduling, 8-Contracts, Closed POs, Completed SOs, CRM Accounts, Open POs, Projects, Sales orders, To-Do, WFO). Below the menu is a table titled "All Active Marketing Campaigns" with columns: Promoid, Campaign Manager, In History, Used For Discounting, Promotion Type, Used For Mail Broadcasting, Description, Start Date, Revenue, Employee Name, and Expiration Date. The table contains 6 rows of data. Below the table is a section titled "Active Dashboard" with a sub-section "Active Pipeline Entries By Type" containing a bar chart. The chart shows three bars: Big Fish (approx. 100,000), Medium Fish (approx. 1,000,000), and Small Fish (approx. 200,000).

HERE'S WHY IT MAKES SENSE

We understand you have a business to run. That's the precise reason we've put together the tools and integrations you need to run your business more efficiently. It's simple really... higher business efficiency = higher profits, and that = good business sense.



Understanding what makes *your* business unique is our specialty



"...wow, great customer-service & billing automation..."

CAPTURE LOST SERVICE REVENUE



Work Order Management



Time & Materials



Multi-Resource Scheduling



Integrated Knowledge-Base

Work-Order Number: 100085
 Status: Acknowledged
 Contact Phone: +1-415-555-6667
 Opened/Received: 04-Mar-2020
 Assigned To: [Not assigned yet!]
 Customer: Ecker Designs, 95 Amber St, Bayshore, CA 94326
 E-Mail: decker@samplename.com
 Due By: 24-Mar-2020
 Priority: Normal
 Sales-Order: 200456
 PO Number:
 Source/Reason-Code:
 Contract: 1017

WO Detail:
 GROUP-Speed Bump
 5 CREW/ZE Crew Count
 3 CREW/ZE/ZE Crew Hours
 10 SBLMP Speed Bump Count
 500 ROW Roll Over Width (Feet)
 100 LENGTH Length (Feet)

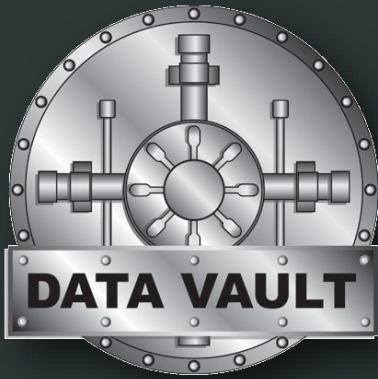
View: Item Type | Reference | Description | Assigned To | Document Date | Due Date

TIME SPENT	BALANCE	PRODUCTS	FOLLOW-UP'S	TASKS	CALL LOG	ATTACHMENTS	APPOINTMENTS
00:00	\$0.00	0	0	0	0	0	0

TAKE YOUR CUSTOMER SERVICE TO THE NEXT LEVEL

- CUSTOMER SELF-SERVICE
- WORK-ORDER MANAGEMENT
- MULTI-RESOURCE SCHEDULING
- PARTS & SUPPLIES
- TIME TRACKING & BILLING
- KNOWLEDGE-BASE
- PRE-CONFIGURED SERVICE RATES
- WARRANTY & RMA
- SERIALIZED PRODUCTS
- ON-SITE INVOICING
- PAYMENT PROCESSING
- E-SIGNATURE CAPTURE
- PHONE/EMAIL/FOLLOW-UPS
- DOCUMENT MANAGEMENT

There's simply nothing else like it

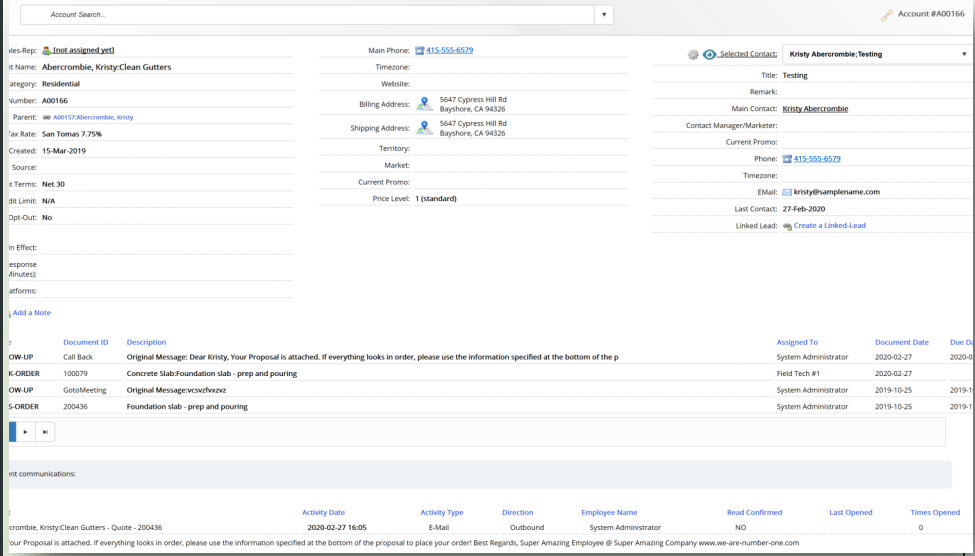


"..one solution for all of our customer and vendor data"

PREPARING YOUR BUSINESS FOR GROWTH



Conversation Tracking



Conversation Tracking



E-mail Tracking



Follow-Up Task Reminders

COMPLETE CUSTOMER RELATIONSHIP MANAGE-

- INBOUND/OUTBOUND PHONE-CALL TRACKING
- TEMPLATE E-MAIL GENERATION
- INBOUND E-MAIL TRACKING
- ROLLING FOLLOW-UPS
- TASK ASSIGNMENTS
- PROJECT MANAGEMENT
- MULTI-RESOURCE APPOINTMENT SCHEDULING
- DOCUMENT MANAGEMENT
- SALES OPPORTUNITY TRACKING
- SERVICE TRACKING
- UNLIMITED CONTACTS PER ACCOUNT
- PARENT/CHILD COMPANY RELATIONSHIPS
- MULTI-LEVEL MARKETING FIELDS
- ACCOUNT ALERTS & POPUPS
- COMPLETE CUSTOMER/VENDOR PROFILES

It's the one tool that does many jobs..



"...it has full-featured inventory with Excellent automation and control"

KNOW WHAT YOU HAVE, WHERE IT IS, WHERE IT'S GOING AND WHEN YOU ARE GOING TO NEED MORE...



Sales-Order Fulfillment

Model Number	Description	Item Type	Base Price	Avg Cost	Primary Category	On Hand	Last Cost
1012	ORing	Inventory	1.00	.50	Machine Parts	.00	.50
31697	MROS	Inventory	50.00	7,500.00	General Product	5.00	7,500.00
5020	Agave	Non-Inventory	.00	1.02	Machine Parts	221.00	5.00
8244	PC meters	Square D branded PMB000 power g	4,298.00	.00	Hardware	-2.00	.00
A1	Custom Storage Shed	Custom Storage Building - Model A1	.00	.00		-1.00	.00
A2	Custom Storage Shed	Custom Storage Building - Model A2	.00	.00		-1.00	.00
A3	Custom Storage Shed	Custom Storage Building - model A3	.00	.00		-1.00	.00
Acme-100	Acme Product 100	Inventory	10.00	.00	General Product	8.00	.00
Acme-100B	Acme Product 100	Inventory	10.00	.00		-7.00	.00
ADA stall - re-stripe	ADA stall - re-stripe	Service	25.00	.00	PM - Stripe	.00	.00
ADA X-hatch - re-stripe	ADA X-hatch - re-stripe	Inventory	25.00	.00		.00	.00
Appliance	Appliance	Non-Inventory	.00	75.00		-10.00	75.00



Purchasing & Receiving



Bar-Coded Inventory Control



Shipping & Tracking

TAKE CONTROL OF YOUR INVENTORY LIFE-CYCLE

- MANAGE INVENTORY, NON-INVENTORY
- GROUP SERVICE RATES BY RATE SCHEDULE
- BUILD ASSEMBLIES
- SERIALIZED PART NUMBERS
- MULTI-LOCATION (WAREHOUSE) TRACKING
- BAR-CODE ENABLED RECEIVING & SHIPPING
- INTEGRATED PURCHASING & RECEIVING
- INTEGRATED SHIPPING LABELS
- SERIALIZED VENDOR RETURNS
- CONFIGURABLE RELATED PRODUCTS
- QUANTITY BREAK DISCOUNTS
- TWENTY CONFIGURABLE PRICE LEVELS
- UNITS OF MEASURE (UOM) SELL/PURCHASING
- MULTI-VENDOR PRICE TRACKING
- CONFIGURE SALES COMMISSIONS PER ITEM
- ITEM SECURITY SETTINGS (ALERTS, etc)
- REALTIME SHIPPING ESTIMATES

CUSTOMIZED SOLUTIONS

Add up to **forty (40)** customized fields to any process without having to know any programming whatsoever. Each module within the software has been designed with ease-of-use and customization in-mind from the ground up.

MULTI-BROWSER SUPPORT

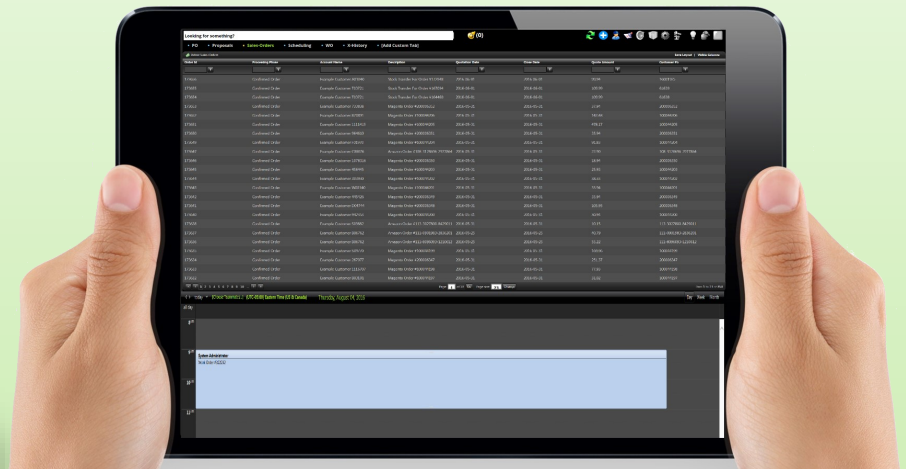


BUILT ON A FOUNDATION READY FOR GROWTH

.NET 4.8 FRAMEWORK
64-BIT MEMORY OPTIMIZED
MS SQL SERVER SCALABILITY
WINDOWS SERVER 2019



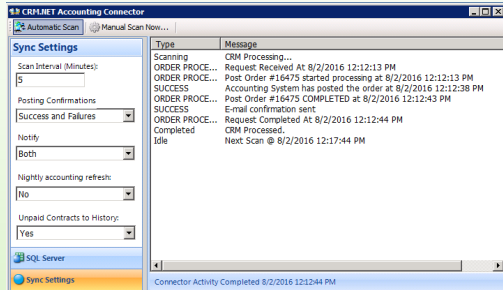
"the most powerful devices without great software isn't really useful at all."



Leveraging your hardware and software like never before...



“...unmatched accounting integration!”



Do you have time to fumble with field-mappings or testing various third-party tools to see which one fits you best? **Probably not.** Our easy and reliable system takes the hard work out of the equation for you. With a few simple clicks, your entire front-office to back-office processes are ready to go. Once you have it setup, you'll have a real-time integration that's as hands-off and care-free as it possibly can be. **It's the total business solution you've been looking for.**

Give them a call:

“...why wait? It's time to get started right now.”



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