



BluWave crm

Functional Summary

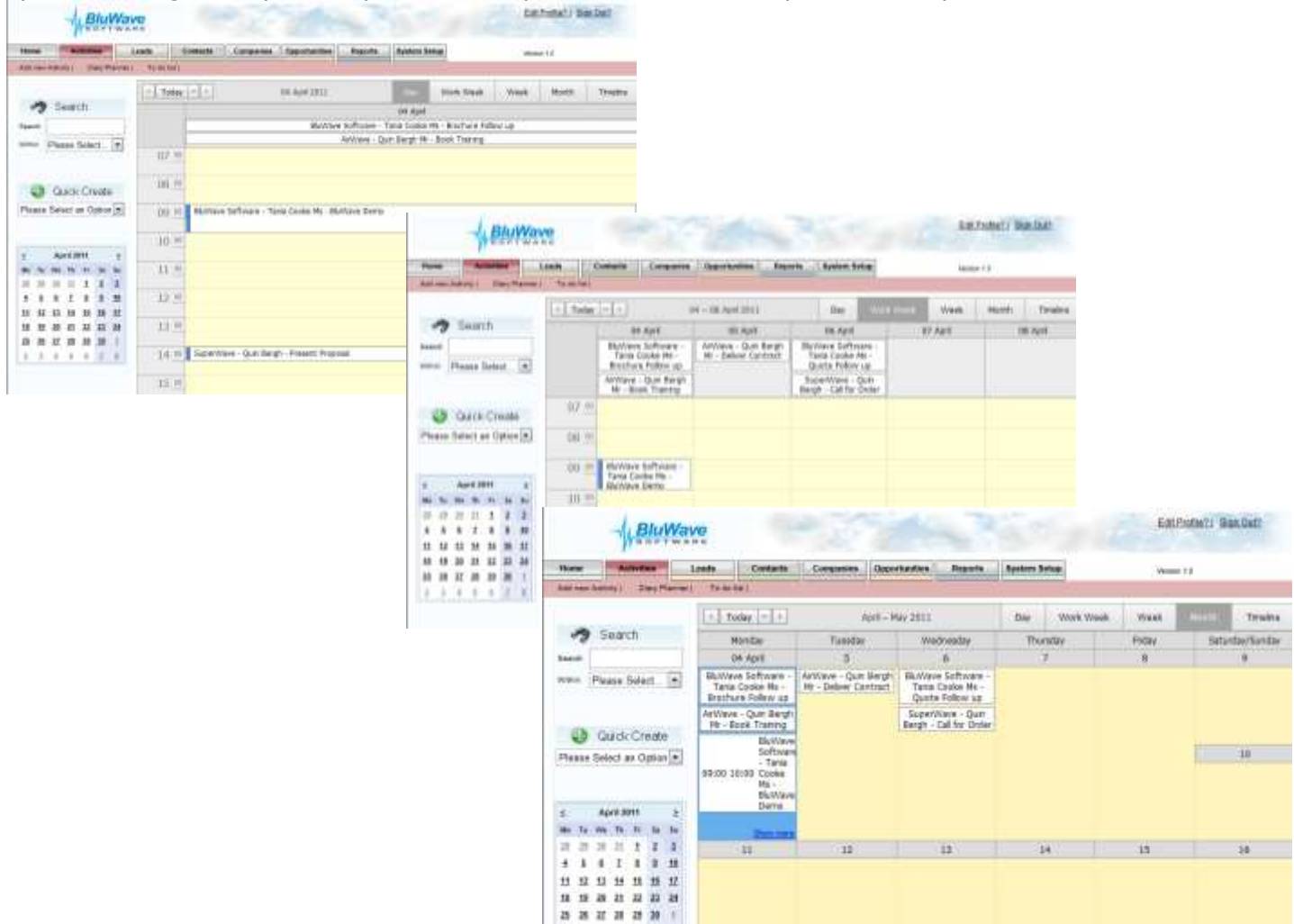
Customer and Contact Management

The Companies and Contacts databases stores and manages all your customers and prospects. Companies can be segmented into types, industries, areas and groups. User defined fields allow you to customize the system for your business. Any number of contact people can be stored per customer. Your customers can be allocated to your branches and sales staff within branches.



Activity and Diary Management

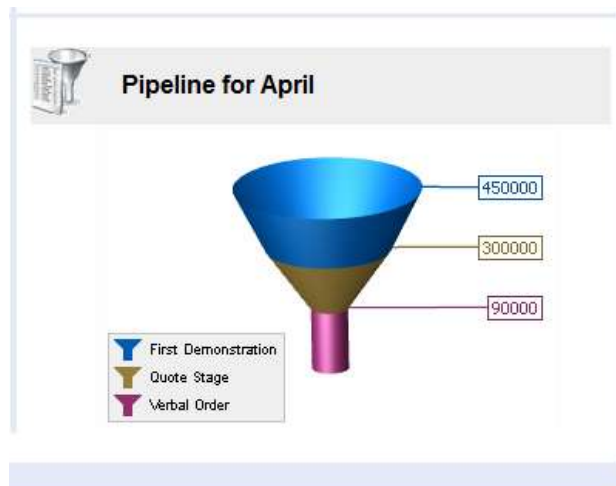
Schedule your customer and prospect follow-ups using the Activity Management function. The system manages daily, weekly and monthly views of each sales person's diary.



Opportunity Tracking (Managing the Sales Pipeline)

Use the Opportunity Tracking functions to manage new business acquisition.

- Define your own sales process for tracking the progress of your sales pipeline.
- The system generates a new business forecast based on expected order dates and sales probability percentages.
- Each sales person can view his pipeline visually on his homepage. Additional graphing on the sales person's dashboard details progress against target.



Performance Dashboard

This page presents a visual summary of the sales person's sales environment. The recent opportunities, activities, contacts and companies are displayed. A graphical "funnel" representation of your sales pipeline is represented. New leads flowing into the system are also visible.



Quotes Automation (1)

Use this function to generate customer quotations. This function is a great productivity booster for a sales person as it achieves 3 processes from one input. Select the items to be quoted and then generate the quotation document – this can be emailed or printed for the customer. At the same time as you prepare the quote, the automatically posts this opportunity into your opportunity pipeline and also generates a quote follow-up activity for the sales person in the activity management function.

Automatic Push Reports

A unique feature of **BluWave crm** is a function to allow you to configure the system to proactively send you regular statistics on your sales team's progress. Users can see their own stats and management can receive performance stats on their whole team.

Integration to Email & Calendaring Clients (2)

BluWave crm integrates to both Outlook and Gmail email and calendaring software. Post appointments in Outlook and they will be automatically posted to your calendar. Send customer emails and they are stored in **BluWave crm** and sent through your email client. File incoming emails into the customer activity history.

Mailing List Management (2)

The system has a fully integrated email marketing function. Generate targeted lists; customize your own HTML message with text and graphics or pictures. Use same pre-defined templates to enhance the look of your message. The mail monitor tracks response rates of your marketing messages, numbers of reads, click-throughs etc. In addition the bounces and un-subscribes are automatically updated into your system.

Leads Management

This database stores all new enquiries. They can be imported from lists or your website. Once actioned and qualified they can be transferred to the company's database for further processing. Use this database for outbound canvassing to process leads prior to sales qualification.

Integration with Pastel Sales Invoice History (2)

In order to effectively manage the sales team an analysis of sales activity against sales results is essential. **BluWave crm** has an interface to your financials allowing you to upload invoice history per customer and sales person.

Notes:

- (1) This feature to be added in May 2011.
- (2) These features to be available later in 2011.