

JobBOSS
& Synergy

JOBBOSS CRM

Maximize Your Level of Customer
Service and Increase Sales

Take the guesswork out of CRM. Who are your most important customers? What is your quote potential for the upcoming quarter? Have you followed up on those quotes you submitted last week?

1. Easily identify your top customers and monitor their activity.
2. Gain insight into quote probability to focus on those with the most potential.
3. Respond accurately and immediately to quote and order phone inquiries.
4. Manage the need and frequency of customer contact.
5. Organize and manage all employee interactions with customers.
6. Grow your business based on reliable customer data.

The Answer for Your CRM

If your answer to these questions is, "I have too much work to do. It takes too much time to find that information. I know I need it but I'm not sure how I would use it," JobBOSS has the answer for you: JobBOSS CRM.

JobBOSS CRM is part of the JobBOSS XT family of business extensions powered by Synergy. Each JobBOSS business extension further empowers all aspects of your shop, resulting in cohesive, efficient, and cost effective operation.

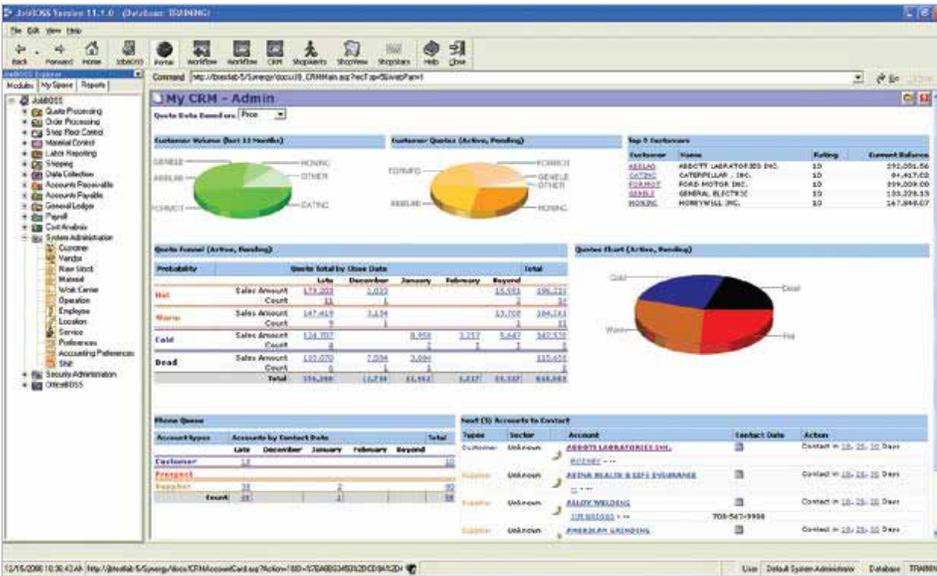
As a seamless extension of the JobBOSS environment, JobBOSS CRM organizes and simplifies the process of maintaining customer relationships. It provides critical tools within key JobBOSS business functions to manage customer interaction. A single click takes you to the Customer Dashboard and a powerful task management system powered by Synergy allows you to log calls, schedule appointments, and track tasks in a to-do list within JobBOSS, where that information is the most useful.

Make Informed Decisions Based on Real-Time Customer Data

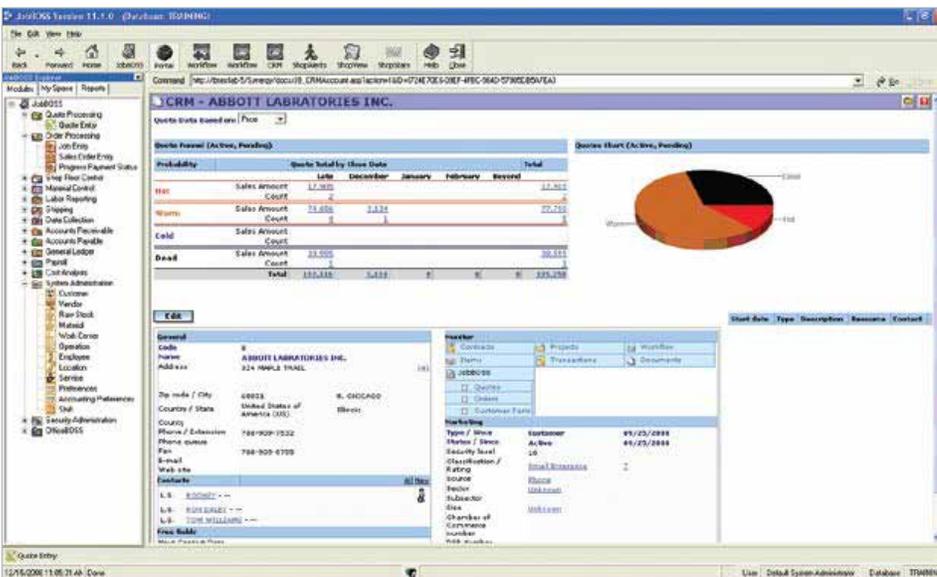
The CRM dashboard provides a graphic overview of customer activity and gives you the "big picture" view of your current business. It identifies your most valuable customers, shows you the quotes in the pipeline along with their probability for turning into sales, and provides a list of the number of calls to be made by account type and date with phone numbers and links to the customer or vendor account.

The customer-specific dashboard shows data for a single customer. It includes the outstanding quotes in the pipeline and their probability for turning into sales for that customer including; contact information, history and a phone log showing the most recent requests and details of those requests. When you need to respond to a customer's request for the status of a quote, you can access the customer-specific dashboard quickly and easily to provide the requested information.

The customer profile screen summarizes all business activity for a specific customer. At a glance, you can see if sales for that customer have increased or decreased from the previous year, how many quotes are in the pipeline and what your win rate with this customer is, the number of jobs you currently have in your shop for them, and your success rate at shipping their orders on time.



The CRM Dashboard Shows a Broad View of Customer Activity



The Customer-Specific Dashboard Shows Activity for a Specific Customer

The customer profile screen provides visibility into the quote funnel or sales forecast for this customer as well as the history associated with your contact with this customer. In addition, you can record new contact or call information directly within this screen. Access the customer profile data via a hyperlink from any place in JobBOSS where the customer field is available.

Increase the Efficiency, Frequency, and Consistency of Your Customer-Facing Operations

JobBOSS CRM organizes and standardizes customer information by making it available to all employees who need that information to do their jobs. The various interactions your employees have with your customers are organized and shared across the organization.

Four basic requests can be created within JobBOSS CRM to manage your customer relationships: To Do, Call Back, Appointment, and Call Notes, which are accessed from Sales Order Entry, Quote Entry, Job Entry, Customer, and many other entry points. All requests created for a specific customer are attached to the account record. A customer record is based on the company, not a contact, so if your contact leaves the company, your information for that company is still valid. In addition, the Call Log identifies who called the customer last and when and View Call Notes allows you to view your contact history with a specific customer. Customer calls can be scheduled to ensure that they are made on a regular basis and important tasks, such as a call to check on a quote, doesn't get missed.

Combine JobBOSS CRM and JobBOSS Workflow for Maximum Process Control

JobBOSS Workflow adds the capability to control complex business processes for customer related activities. It adapts to your unique operations, allowing you to define the routing, responsibility, and data required for a particular Workflow task.

For more information please see our website www.jobboss.com