



# Contact Management

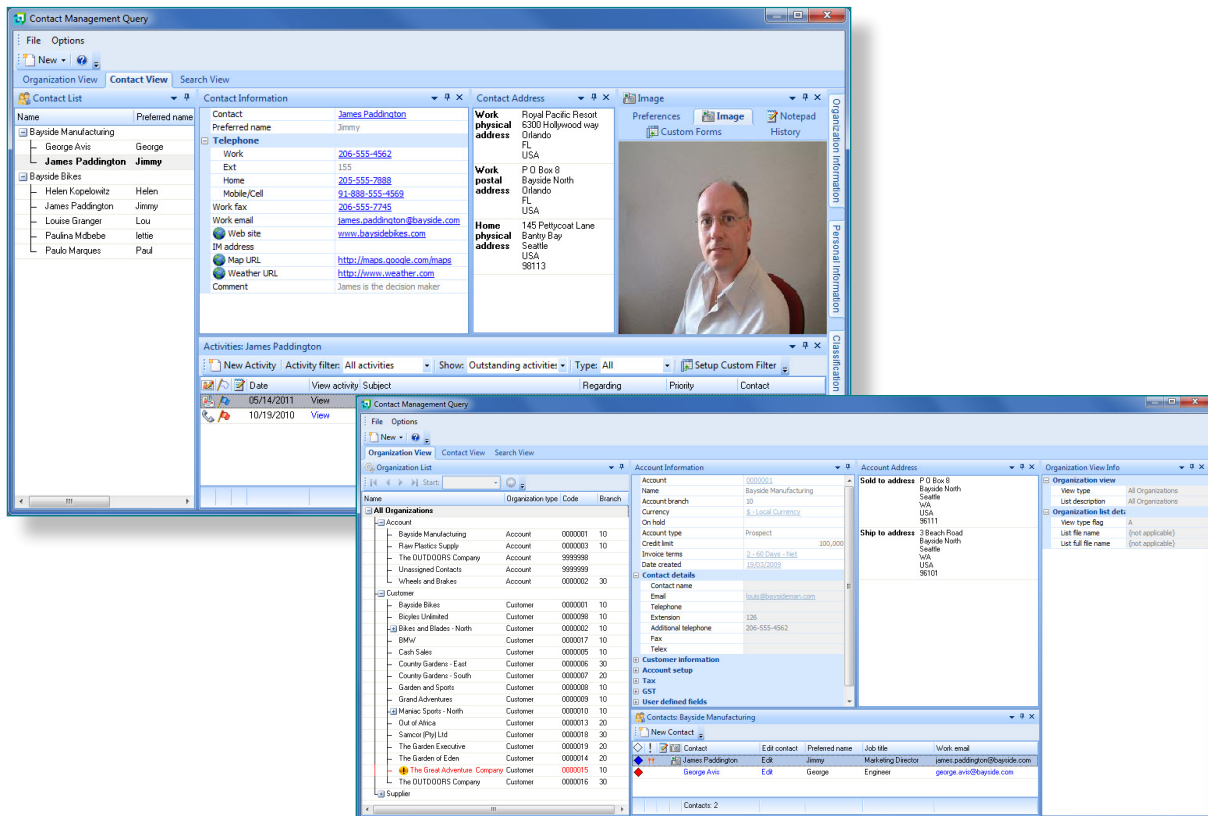
Fact Sheet

SYSPRO Contact Management allows you to define and manage a rich set of information about the people with whom you do business as well as between individuals within your organization. This applies not only to traditional SYSPRO customers and suppliers, but also to other business relationships such as potential customers (prospects), consultants, competitors, etc.

Visibility of the communications (or activities) that occur between the touch-points of organizations facilitates proactive intervention by management, improves relationships and eliminates duplication of efforts.

Contact Management allows for multiple contacts to be assigned to customers, suppliers and accounts (e.g. organizations or people that are not customers or suppliers). Activities (e.g. details regarding interactions with these contacts such as phone calls, emails and visits) are stored against the contact. Integration with **Microsoft Outlook** allows email correspondence to be sent and updated as an activity within the Contact Management system. The contact address information is stored in a structured format allowing integration to **Microsoft MapPoint**.

SYSPRO provides a free utility that allows users of **Microsoft Office XP** and **Microsoft Office 2007** to interact with the contact management data, regardless of whether they use SYSPRO or have it loaded on their workstation. This allows virtually everyone in your organization to have access to the contact management data.





## The Facts

Fact Sheet

### The Benefits of Contact Management

- Improve customer and supplier service through instant on-screen access to all relevant information including touch-points with your company
- Improve new customer acquisition by allowing you to record and plan activities in a centralized environment against accounts
- Powerful, extensive and customizable query capability with multiple views
- Flexible activity posting and viewing

### Contact Management Features

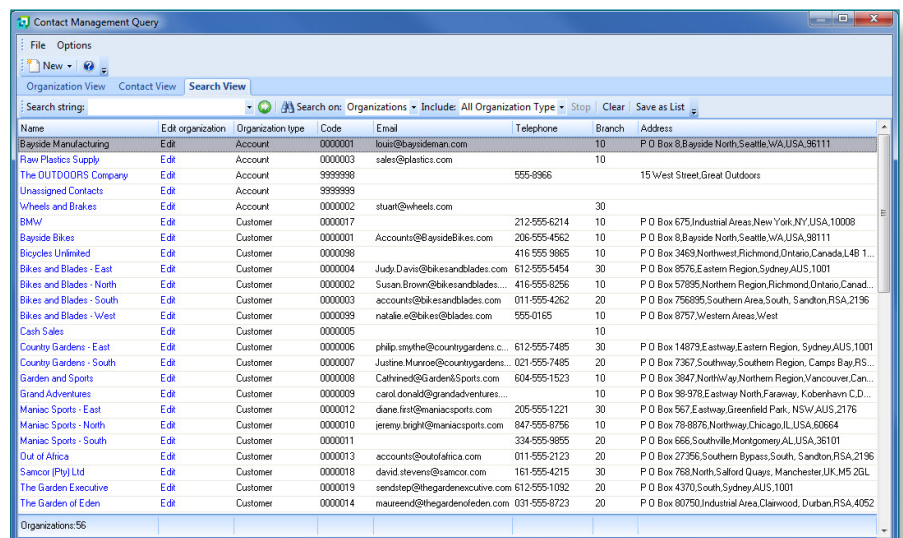
- Integration to Microsoft Outlook for sending and receiving email
- Integration to Microsoft Office for across-the-organization use of SYSPRO Contact Management information
- Structured addresses provide enhanced location support (including Microsoft MapPoint integration)
- Unlimited custom information held against each contact can be structured and viewed with appropriate validation
- Developed using the same technology as the rest of SYSPRO ERP and therefore works seamlessly with the rest of SYSPRO on Windows and Unix platforms, using SQL and ISAM databases and in a stand-alone or Client/Server environment
- Contact Management only user licence
- Supplier created from an account
- Define dynamic organization lists
- Send bulk email to a number of contacts
- Ability to synchronize CMS contacts to Microsoft Outlook
- User fields configured and captured when posting an activity

### Integration with SYSPRO

- Accounts Receivable
- Accounts Payable
- Microsoft Outlook (used for sending and receiving email)
- Office (allows flexible and secure querying capability in MS Word and MS Excel)
- Microsoft MapPoint (allows viewing of locations and route planning)

### Querying and Reporting

- Powerful and extensive Query capability with multiple views
- Highly customizable look and feel. Uses docking panes and listviews to present information as you want to see it
- Drag and Drop customization of new and existing fields
- Easy to use search for quickly finding contact information
- Quick zoom into Microsoft MapPoint at any appropriate address field
- SYSPRO Reporting Services used for reporting providing highly customized reports, exports, extracts and batch capabilities
- VBScript enabled for developer level customization



Name	Edit organization	Organization type	Code	Email	Telephone	Branch	Address
Bayside Manufacturing	Edit	Account	0000001	louis@baysideman.com		10	P O Box 8 Bayside North,Seattle,WA,USA,98111
Raw Plastics Supply	Edit	Account	0000003	sales@plastics.com		10	
The OUTDOORS Company	Edit	Account	9999998		555-8966		15 West Street,Great Outdoors
Unassigned Contacts	Edit	Account	9999999				
Wheels and Brakes	Edit	Account	0000002	stuart@wheels.com		30	
BMW	Edit	Customer	0000017		212-555-6214	10	P O Box 675,Industrial Areas,New York,NY,USA,10008
Bayside Bikes	Edit	Customer	0000001	Accounts@baysidebikes.com	206-555-4562	10	P O Box 8, Bayside North,Seattle,WA,USA,98111
Bicycles Unlimited	Edit	Customer	0000098		416 555 9865	10	P O Box 3469,Northwest,Richmond,Ontario,Canada,L4B 1...
Bikes and Blades - East	Edit	Customer	0000004	Judy.Davie@bikesandblades.com	612-555-5454	30	P O Box 8576,Eastern Region,Sydney,AUS,1001
Bikes and Blades - North	Edit	Customer	0000002	Susan.Brown@bikesandblades.com	416-555-8256	10	P O Box 57895,Northern Region,Richmond,Ontario,Canada...
Bikes and Blades - South	Edit	Customer	0000003	accounts@bikesandblades.com	011-555-4262	20	P O Box 756895,Southern Area,South, Sandton,RSA,2196
Bikes and Blades - West	Edit	Customer	0000099	natalie.e@bikesandblades.com	555-0165	10	P O Box 8767,Western Areas,West
Cash Sales	Edit	Customer	0000005			10	
Country Gardens - East	Edit	Customer	0000006	philip.smythe@countrygardens.c...	612-555-7485	30	P O Box 14879,Eastway,Eastern Region, Sydney,AUS,1001
Country Gardens - South	Edit	Customer	0000007	Justine.Munroe@countrygardens...	021-555-7485	20	P O Box 7367,Southway,Southern Region, Camps Bay,RS...
Garden and Sports	Edit	Customer	0000008	Cathrined@Garden&Sports.com	604-555-1523	10	P O Box 3947,NorthWay,Northern Region,Vancouver,Can...
Grand Adventures	Edit	Customer	0000009	carol.donald@grandadventures...		10	P O Box 98-978,Eastway,North,Faraway,Kobenhavn,C.D...
Maniac Sports - East	Edit	Customer	0000012	diane.first@maniacsports.com	205-555-1221	30	P O Box 567,Eastway,Greenfield Park, NSW,AUS,2176
Maniac Sports - North	Edit	Customer	0000010	jeremy.bright@maniacsports.com	847-555-8756	10	P O Box 78-8876,Northway,Chicago,IL,USA,60664
Maniac Sports - South	Edit	Customer	0000011		334-555-9855	20	P O Box 666,Southville,Montgomery,AL,USA,36101
Out of Africa	Edit	Customer	0000013	accounts@outofafrica.com	011-555-2123	20	P O Box 2735,Southern Bypass,South, Sandton,RSA,2196
Samcor (Pty) Ltd	Edit	Customer	0000018	david.stevens@samcor.com	161-555-4215	30	P O Box 768,North,Salford Quays, Manchester,UK,M5 2GL
The Garden Executive	Edit	Customer	0000019	sendstep@thegardenexecutive.com	612-555-1092	20	P O Box 4370,South,Sydney,AUS,1001
The Garden of Eden	Edit	Customer	0000014	maureen@thegardenofeden.com	031-555-8723	20	P O Box 80750,Industrial Area,Claarwater, Durban,RSA,4052