

Business Suite

Customer Relationship Management | Software

CRM

Business Suite 9
Designed To Help You Get And Keep More Customers



Tigerpaw™
SOFTWARE





Tigerpaw Software **Business Suite**

is a comprehensive group of integrated software (CRM) modules that support sales, marketing, contact management, customer service, and inventory control. The suite integrates with Microsoft® office and is designed to enhance productivity by tracking customers and prospects throughout an entire organization. The suite combines four modules: Pursuit™, for contact management and marketing; Quotes, for sales force automation and opportunity management; Service and Repair, for customer service call tracking, technician tracking and dispatching; and Parts, for inventory control and purchasing.

The latest version is designed to optimize the process of managing and empowering your personnel across all channels of customer interaction. Tigerpaw's Business Suite helps businesses plan, execute, and evaluate workforce optimization strategies that enable them to profitably develop and maintain customer relationships through quality, one-on-one interactions; ensuring that the right people with the right knowledge are available when customers need them most. Tigerpaw's solutions have helped companies to increase profitability through amplified customer loyalty and satisfaction.

The Business Suite also supports different mobility options that link your employees in the field with the home office seamlessly. This provides the ability to communicate at all levels and provide superior customer service.

Product Overview



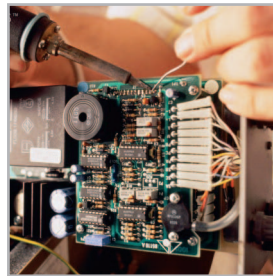
Pursuit

is a comprehensive contact, marketing, and account management system designed to organize and track information (including follow-ups) for contacts and businesses.



Quotes

is a complete quoting, opportunity management, sales force automation, and work order processing system designed for use with Pursuit. Quotes makes it easy to manage and produce proposals, work orders, and invoices..



Service and Repair

is a complete service order, maintenance contract tracking, and technician scheduling system. Service and Repair tracks all service issues ranging from telephone support to on-site repair.



Parts

is a complete inventory control, purchase order tracking, location transfers, and serialized parts monitoring system. Parts tracks all types of inventory including assemblies (kits) and manufactured goods.

Pursuit

Pursuit is designed to maintain a hierarchy of accounts where each account can have more than one contact. Each account record contains a great deal of information about a business, including SIC (industry identifiers) codes, notes, file folders of information, linked documents (document imaging with scanning support), list of quotes, list of service orders, inventory history, maintenance contracts, and more. Each contact record contains custom fields, contact notes, and profiles.

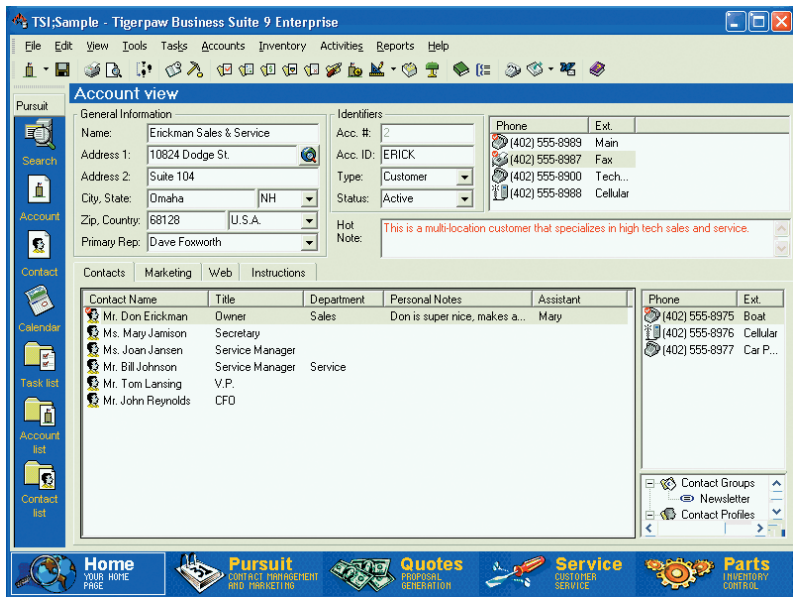
Features:

- Track unlimited accounts with unlimited contacts.
- Schedule unlimited tasks for an account or contact.
- Create unlimited user-defined fields.
- Fax and auto-dial phone numbers.
- View your day, week, month, and year at a glance.
- Print accounts, contacts, follow-ups, and management reports.
- Link documents to accounts, contacts, quotes, invoices, and service orders.
- Scan documents directly into the Business Suite.
- Write letters using Microsoft Word 2000 or newer.
- Link to phone systems using CTI/TAPI functionality.

Benefits:

- Maintain every important piece of information for a prospect or customer.
- Measure the effectiveness of marketing campaigns.
- Easily manage groups of accounts or contacts.
- Process pre-developed activities to code accounts, schedule tasks, and more.
- Manage workload and measure effectiveness of staff.
- Automatically notify staff when work needs to be completed.
- Automated marketing features allow for more effective communication with customers and prospects.

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Follow-up is maintained by scheduling tasks. A task can be a phone call, an appointment, or a to-do. Each of these categories can have unlimited custom types of tasks such as "Appointment - Service Call".

Calendars and to-do list show tasks and scheduled events. When you review an account, you can see tasks scheduled for sales follow-up as well as scheduled service work.

Pursuit includes enhanced CTI and TAPI functionality providing a powerful CRM solution that can link with many different phone systems. This functionality allows you to dial-out from an account or contact and also provides screen pop capabilities on incoming calls.

Pursuit has a powerful automatic marketing system called Activities. This system gives you the ability to set up automatic reminders, generate emails, automatically profile accounts, and create word-merges files for direct marketing. These activities can be linked in paths, and a customer or prospect can be marketed to automatically. Pursuit also has the ability to group similar accounts which then can be marketed to simultaneously.

Pursuit's advanced scheduling and monitoring system also helps coordinate personal schedules and notification of workflow assignments.



Quotes

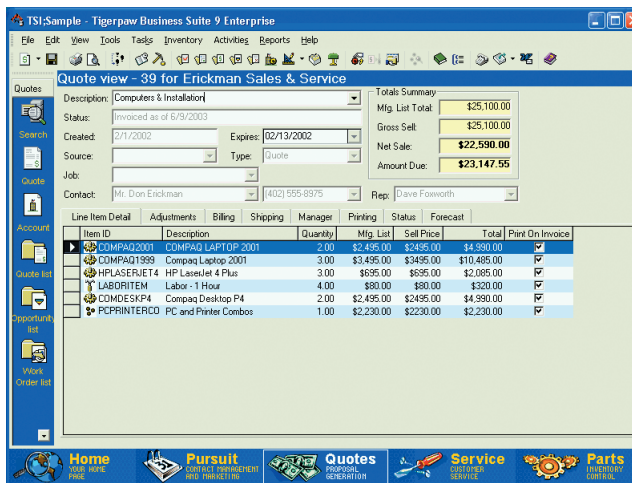
Features:

- Opportunity management.
- Marketing automation.
- Track quotes by customer, sales rep, status, and type.
- Perform sales forecasting.
- Email, fax, and print quotes with ease.
- Print custom quotes designed in Crystal Reports.
- Produce a work order and invoice.

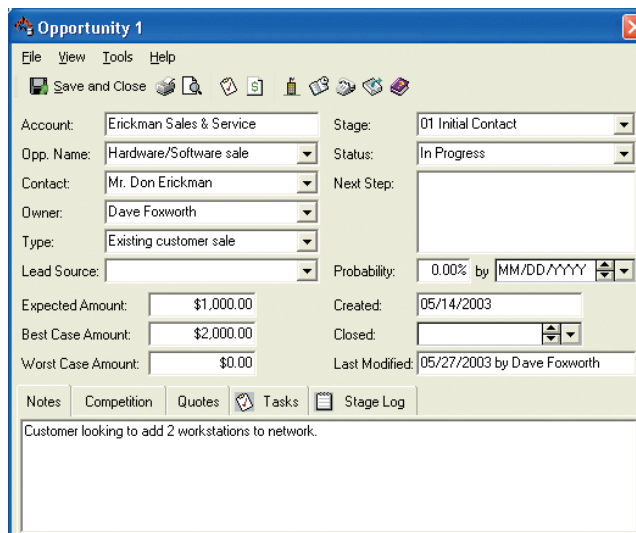
Benefits:

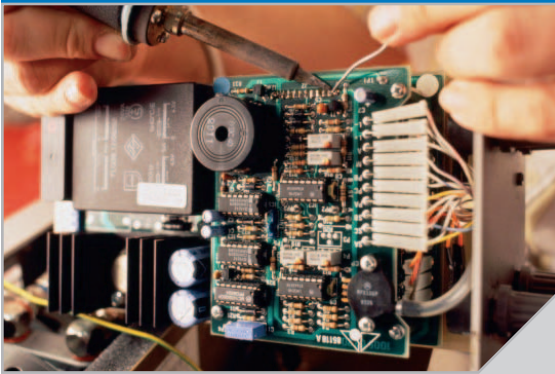
- Better sales pipeline management.
- Streamlined, consistent marketing from the sales force.
- Once a quote has been accepted, it can be processed as an order.
- Once the quote has been service ordered, all items on the quote are automatically added to the parts and labor section of the service order (requires the Service and Repair module).

Quotes is a fully functionally sales force automation, quoting, and work order processing module. It features many tools that allow you to better manage your sales cycle and sales team. Quotes provides the tools necessary to track opportunities, market to those opportunities, manage your sales pipeline, produce quotes, and ultimately fill orders.



When combined with Pursuit, Quotes becomes a powerful sales force automation and contact management system. Quotes is an add-on module to Pursuit; a user must be logged into Pursuit for Quotes to be available therefore a Pursuit license is required for each Quotes license.





Service and Repair

Features:

- Produce service orders by customer, tech, problem, status, and type.
- Create unlimited service order notes, problem descriptions, and work performed.
- RMA's for any item on a service order.
- Track items serviced and parts/labor used on an order.
- Exchanges for customer inventory.
- Enhanced maintenance contract billing.
- View technician schedules one at a time or as a group.
- Maintain maintenance contracts: hourly, metered, time and profitability.
- Track technician time, both billable and non-billable for each order.

Benefits:

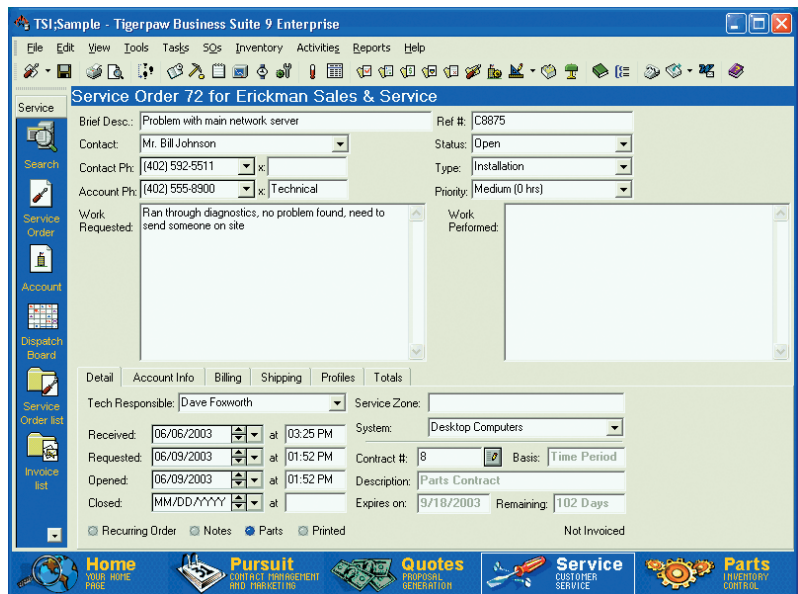
- Faster technician scheduling using the graphical Dispatch Board.
- More profitability from better tracking of technician time.
- Monitor maintenance contracts for profitability.
- Perform contract billing.
- Track service orders by customer, technician, and problem.
- Process exchanges with customer inventory.
- Manage RMAs back to your vendor.

Service and Repair is a comprehensive customer service tracking system which tracks service orders, technicians, and maintenance contracts. It prepares a detailed service order, while relating it to maintenance contracts and customer inventory. After entering the problem, you can select items to be serviced from customer inventory, enter the work request, assign and schedule technicians using the calendar view, and print or email the service order.

The system maintains all the historical information for the parent account, including contract and technician time usage. Once the items used for the service order have been filled from inventory, the invoice can be printed and posted. Posting of invoices from Tigerpaw will create detailed records for exporting to your accounting system.

Service also provides a powerful profiling tool that allows your service department to track related problems. This added ability helps you identify problems and resolutions quicker for superior in-field customer service.

The Business Suite has considerable flexibility in maintenance contract invoicing, which can provide your business with increased cash flow.



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Parts

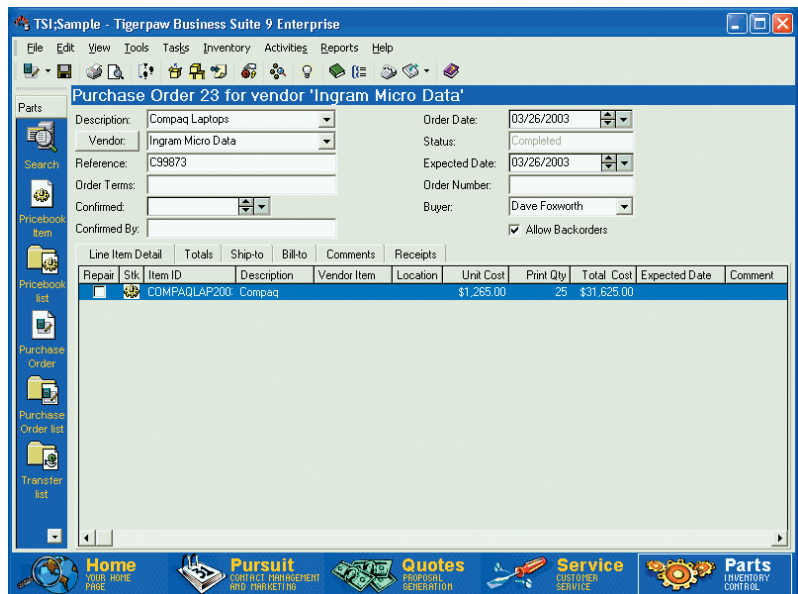
Features:

- Multi-level pricing on inventory receipts.
- Serial numbers on received items.
- Create assemblies and kits.
- Customer purchasing history.
- LIFO, FIFO, and Average costing methods.
- Unlimited physical locations; multiple warehouses, trucks.
- RMA, in house repair, customer site, and staging status.
- Automatic transfers between locations.
- Adjustments to counts, costs, locations and history.
- Purchase order status and history.
- Physical inventory and reorder points.

Benefits:

- Easily manage inventory levels.
- Manage purchase orders and receipt of inventory.
- Use Smart Order to order inventory needed to fill orders.
- Move inventory to different locations.
- Track the complete history of a serialized item.
- Review the purchasing history of any item.
- Maintain minimum, maximum, and re-order quantities.
- Partially receive inventory and manage case lots.

Parts is a comprehensive inventory management system which includes purchase orders, receiving, inventory locations, transfers, physical inventory maintenance, and serialized item tracking. Each material item in the price book has corresponding inventory detail which shows all purchases, sales, quantities on hand, quantities reserved, quantities at each physical location, and the latest costs and value of the items in inventory.



Purchase Orders can be created and linked to a job for easy reference upon receipt of material. Auto-purchasing lets you order just what is needed for a specific job. Viewing and processing received inventory is easy with the Received Items view. Physical inventory is managed using a comprehensive inventory control system to record current inventory levels. You can prepare count sheets, perform the actual physical counting of inventory, and then enter variances into a spreadsheet-like data entry window. Reconciliation of recorded on-hand quantities to actual inventory quantities by location easily updates the value of inventory in your accounting system.

Parts is an add-on module for either Quotes or Service and Repair; users must be logged into either Quotes or Service and Repair in order to access Parts. If the Parts module is used with Quotes, a Quotes license is required for each Parts user. If the Parts module is used with Service and Repair, a Service and Repair license is required for each Parts user.

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