

# Business Suite 9

## ENTERPRISE

Tigerpaw Business Suite Enterprise 9 is a Customer Relationship Management (CRM) System designed to build long-term meaningful relationships with your customers.

**Account view - Erickman Sales & Service**

General Information: Name: Erickman Sales & Service, Address: 10824 Dodge St, Suite 104, Omaha, NE 68128, U.S.A.

Staff List:

Contact Name	Title	Department	Personal Notes	Assistant	Phone	Ext.
Mr. Don Erickman	Owner	Sales	Don is super nice, makes a...	May	(402) 555-8975	Boat
Ms. Mary Jamison	Secretary				(402) 555-8976	Cellular
Mr. Joan Jensen	Service Manager	Service			(402) 555-8977	Car P...
Mr. Bill Johnson	Service Manager	Service				
Mr. Tom Lansing	V.P.					
Mr. John Reynolds	CFO					

The Tigerpaw Business Suite is a group of integrated software modules for contact management, sales management and quoting, customer service, and inventory control.

The Suite is designed to track prospects throughout the sales cycle and all touch-points with customers after the sale. There are four modules in the Suite: Pursuit™ for contact management and marketing, Quotes for sales force automation, opportunity management, and line item quoting, Service & Repair for customer service, maintenance contracts and technician tracking, and Parts for purchasing and inventory control. The Suite includes an advanced scheduling and monitoring system that helps coordinate personal schedules and provides notification of workflow assignments. Various calendar views - including dispatching, support drag-and-drop rescheduling. Accounting interfaces are included for QuickBooks®, Peachtree®, Great Plains®, and AccPac® plus Tigerpaw has a powerful accounting link wizard that allows you to link to other accounting packages.

### Pursuit contact management and marketing:

Pursuit is a comprehensive contact, marketing, and account management system designed to help you track all information and follow-up for contacts and businesses. Pursuit includes contact management features such as task scheduling, TAPI/CTI dial out and inbound screen pop capabilities, email, fax, and mail merge to Word®. The Business Suite is designed to work with Microsoft Office®.

### Pursuit helps you:

- Maintain every important piece of information for a prospect or customer.
- Measure the effectiveness of marketing campaigns.
- Set up automatic marketing programs.
- Easily manage groups of accounts or contacts.
- Contact groups of accounts using email and fax, or use Word for targeted correspondence.
- 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.
- Scan documents and link them to accounts.
- Integration with Microsoft Outlook® for increased efficiency.

**Quote view - 39 for Erickman Sales & Service**

Description: Computers & Installation

Status: Invoiced as of 6/5/2003

Created: 07/23/02 Expires: 10/13/2002

Source: Type: Quote

Contact: Mr. Don Erickman (402) 555-8975

Rep: Dave Fowforth

Line Item Detail	Adjustments	Billing	Shipping	Manager	Printing	Status	Forecast
Item ID	Description	Quantity	Mfg. List	Sell Price	Total	Price On Invoice	
COMPQA2000	COMPQ LAPTOP 2000	2.00	\$18,000.00	\$32,250.00	\$4,900.00	\$4,900.00	
COMPQA1999	Compas Laptop 2001	3.00	\$3,495.00	\$3495.00	\$10,485.00		
HPLASERL14	HP LaserJet 4 Plus	3.00	\$695.00	\$695.00	\$2,085.00		
LABORITEM	Labor - 1 Hour	4.00	\$90.00	\$90.00	\$360.00		
COMDESKP4	Compas Desktop P4	2.00	\$2,495.00	\$2495.00	\$4,990.00		
PCPRINTRCO	PC and Printer Combos	1.00	\$2,230.00	\$2230.00	\$2,230.00		

### Quotes sales force automation and management:

Quotes is a complete quoting, sales pipeline management, and work order processing system designed for use with Pursuit.

### Quotes helps you:

- Manage sales opportunities more effectively.
- Better track, manage, and refine your sales pipeline.
- Track quotes by customer, sales rep, status, and type.
- Perform sales forecasting.
- Email, fax, or print quotes with ease.
- Print custom quotes.
- Maintain assemblies and kit pricing.
- Define multiple levels of pricing.
- Produce a work order and invoice.

**Service Order 72 for Erickman Sales & Service**

Brief Desc: Problems with main network server

Contact: Mr. Bill Johnson Status: Open Ref ID: C3875

Contact Ph: (402) 555-8971 Type: Installation

Account Ph: (402) 555-8900 Priority: Medium (8 hrs)

Work: Run through diagnostics, no problem found, need to send someone on site

Requested: Vibe Performed

Tech Responsible: Dave Fowforth Service Zone: Desktop Computers

Received: 06/06/2003 03:25 PM System: Desktop Computers

Requested: 06/09/2003 01:52 PM Contact ID: B Basis: Time Period

Opened: 06/09/2003 01:52 PM Description: Parts Contract

Closed: MM/DD/YYYY Expires on: 9/18/2003 Remaining: 102 Days

### Service & Repair customer service tracking:

Service & Repair is a complete service order, contract tracking, and technician scheduling system. Service & Repair helps track service issues ranging from telephone support to on-site installation and repair.

### Service & Repair helps you:

- Schedule technicians more effectively using the graphical Dispatch Board.
- Track technician time and measure technician profitability.
- Invoice for material and labor.
- Monitor maintenance contracts for profitability.
- Perform contract billing.
- Profile service orders for better service management.
- Track service orders by customer, technician, and problem.
- Email, fax, or print service orders.
- Process exchanges with customer inventory.
- Manage RMAs back to your vendor.

**Purchase Order 23 for vendor 'Ingram Micro Data'**

Description: Compas Laptop Order Date: 03/26/2003

Vendor: Ingram Micro Data Status: Completed

Reference: C3873 Expected Date: 03/26/2003

Order Terms: Order Number: Buyer: Dave Fowforth

Confirmed By: Confirmed By: Allow Backorders

Repair	SH	Item ID	Description	Vendor Item	Location	Unit Cost	Part Qty	Total Cost	Expected Date	Comment
		COMPQA2000	Compas			\$1,265.00	25	\$31,625.00		

### Parts Inventory Control and Purchasing:

Parts is a complete inventory control, purchase order tracking, and serialized parts monitoring system. Parts tracks all types of inventory such as material, assemblies, kits, and manufactured goods.

### Parts helps you:

- 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.



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