

SFA Plus

Enterprise Software
Forged From Experience

Benefits from SFA Plus™:

- Customer profiling with work benches help your CSR's know what's going on with the customer at the click of a mouse.
- Flexibility allows your company to implement in conjunction with your sales management methodology.
- Manage customers and leads and the opportunities at each.
- Roll up opportunities for pipeline analysis and forecasting.
- Tightly integrated with both the front office and back office applications in the ERP Plus™ suite.

Verticent's enterprise application software solution entitled ERP Plus™ integrates back-office applications for manufacturing, distribution and financials with front-office applications for customer support and sales force automation. ERP Plus™ is an internet-enabled software suite that extends communications across your entire organization and throughout your virtual supply chain. Verticent is focused on developing software solutions that enable users to know, understand and respond to their customers, suppliers, partners and employees.

Unique to the Verticent solution is a longstanding commitment to CRM. From day one, all Verticent products were designed to incorporate functionality that improves customer communications at every point across the enterprise. CRM has been a consistent vein during the development and evolution of Verticent products, and SFA Plus™ and Support Plus™ showcase our CRM commitment. SFA Plus™ and Support Plus™ comprise Verticent's CRM solution by offering contact management, opportunity management, time management, marketing automation, customer service and more. Together, these CRM modules deliver the solutions you need to boost corporate sales and improve overall levels of customer satisfaction. SFA Plus™ and Support Plus™ offer all of the functionality of a best-of-breed CRM solution – while integrating seamlessly with the Verticent ERP Plus™ software suite. They also complete Verticent's end-to-end system to enable information flow from marketing, sales and service to critical back-office operations such as manufacturing, distribution and financials.

CONTACT MANAGEMENT

When it comes to making every sales call count – SFA Plus™ is your best solution. SFA Plus™ delivers critical customer contact information to the right person at the right time. With SFA Plus™ delivering valuable information, your sales team boosts productivity, eliminates extra paperwork, improves order accuracy and – *most importantly*– enhances communications with current and potential customers.

Contact management within SFA Plus™ enables you to efficiently manage customer contacts by recording and tracking all contact data, creating comprehensive contact profiles and targeting quality sales opportunities.

CAPTURING DATA AND CREATING PROFILES

When it comes to capturing and organizing contact information, flexibility is imperative. In SFA Plus™, unlimited user-defined fields are available for extra contact profile information. You also can attach *Notes* or document files – such as word processor or spreadsheet items – to customer profiles to expand contact data details. From an established database of contact profiles, you instantly gain access to contact histories. This functionality is critical in understanding and viewing activities for each customer by date, status, contact name or subject. These fields also offer drill-down capabilities to more details such as participants, location, subject and upcoming activities.

All contact profiles also are viewable by account type – such as vendor, dealer, partner or competitor. An intuitive tree view reveals relationships among company entities, and you can view customer service cases via the account activity list.

TARGETING SALES OPPORTUNITIES

SFA Plus™ offers the powerful *Opportunity Workbench* and *Quote Workbench* as intuitive graphical mechanisms for managing opportunities and quotes with accurate, shared information about accounts, contacts, interests and historical activities. SFA Plus™ also enables your sales force to easily define sales territories and to generate informative reports.

Aligning territories has never been easier. Management-level sales personnel can assign sales groups within a group hierarchy by dragging and dropping items within that specific hierarchy. Assignment levels can be based on different parameters such as SIC, employee, revenue, zip code, and more. SFA Plus™ also supports geographic or named accounts – and you can even allow software security privileges (such as create/view/full) by user or region.

Lead tracking functionality in SFA Plus™ enables you to automatically track leads based on territories, while the *Lead Pass* feature also allows you to track the source, product, priority, etc. of each lead activity. And your sales staff is notified of leads via activity alarms.

When the sales team has been notified and opportunities are in motion, it's important to have access to lead activity reports. You can verify sales activity by accessing standard reports organized by begin-date, end-date, user, sales group or company. SFA Plus™ also performs sales cycle analysis of sales group, sales rep or current user, and instant queries deliver summary reports of sales pipeline items – which are represented graphically in different bar graphs or pie charts. These reports offer drill-down functionality to deliver detailed information on sale status and results.

COMMUNICATION IS CRITICAL

With all the new information gathered and generated by SFA Plus™, communication between sales personnel and the rest of the enterprise becomes more effective and efficient. SFA Plus™ seamlessly integrates with third-party email, fax or modem applications to transmit customer-centric documents. It also enables other convenient communication functions such as sales call planning, recording and reporting. Sales call planning allows you to setup call activities during which users indicate priority levels, dates, times, status, subject, etc. for specific conversations. During the call it's easy to capture vital data – such as who, what, where, when and why – via activity detail fields.

ACTIVITY ACCESS

Activity management capabilities enable your entire sales force to track and enter opportunity specific, account-specific, contact-specific or personal activities – including meetings, phone calls, events, etc. In SFA Plus™, events are completely user-defined. SFA Plus™ activity management functions also allow you to track open and completed activities by company and to view list of activities by date, status, type, contact owner and subject. Drilldown functionality delivers greater activity detail. You also can access standard activity reports via specific parameters including begin-date, end date, user, sales group, company, etc.

CALENDAR CONTROL

Timing is everything. And SFA Plus™ allows you to schedule and manage appointments according to a personal calendar with daily, weekly or monthly views. You also can easily synchronize SFA Plus™ with Microsoft Outlook™.

On your SFA Plus™ calendar, you can easily customize different views by dragging and dropping appointments between them. You also have access to a handy *To-Do List* featuring chronological views that display color-coded and dated items to indicate status and history. The *To-Do List* in SFA Plus™ is a powerful sales tool. It does more than highlight events – it enables you to access a detailed list of **all** your activities in a browse format that readily displays planned date, subject and contact information. *To-Do List* icons even graphically illustrate the type of scheduled activity.

And just in case you forget a project, you can set alarms to remind you. SFA Plus™ allows you to select alarm parameters such as time, date and priority – and certain alarm fields integrate seamlessly with the third-party daily-planning applications for additional scheduling and alarm functionality.

MARKETING MANAGEMENT

When perception is reality – and your marketing and sales teams are communicating effectively – you enhance your bottom line. SFA Plus™ marketing management functionality allows marketing professionals to define and execute promotional campaigns that generate quality leads for your sales force. These marketing capabilities allow you to define campaign steps, descriptions, events, costs, instructions and more.

An important initial step in campaign development and execution involves tracking and understanding competitor initiatives. You can easily establish competitor accounts to hold strategic information and news items. With the SFA Plus™ optional module Smart Encyclopedia™, you can institute total competitor tracking – including automated Web site monitoring and notification.

Marketing management in SFA Plus™ also includes an automated literature fulfillment queue that allows users to mail, fax or email requested information to their contacts. It even simplifies customer correspondence. Automated letter generation allows users to merge sales letters to word processor templates where they can preview, print, and fax or email their responses to customers. Labels are easy to print; users have direct access to label and envelope templates in third-party word processing applications.

Telemarketing is another critical lead-generating function – and SFA Plus™ enables lead generation and qualification with call scripting capabilities. It's also easy to enhance telesales call scripts – users simply can drag and drop questions to change scripts to meet different scenarios. SFA Plus™ also facilitates automatic lead distribution to appropriate sales reps or business partners.

Data Synchronization

To ensure data is current between corporate and remote databases, SFA Plus™ also features an integrated data synchronization utility; Sync Plus™™ enables easy data synchronization in SFA Plus™ and provides a summary report when data is exchanged between corporate and remote databases. And since Sync Plus™ users directly initiate synchronization, no additional IT staff is required to configure and maintain the sync process. Sync Plus™ also implements a "Last Update Wins" business rule to resolve any data conflicts.

Other Features of SFA Plus™:

- Sales Hierarchy and Organization
- User defined fields
- Sales/Marketing Work Bench
- Opportunity Quote Work Bench
- Activity Blaster
- Mail Merge with Word
- Outlook Integration for contacts and calendar
- Import utility for contacts and leads
- International addresses and phone numbers
- Capture competitive information

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