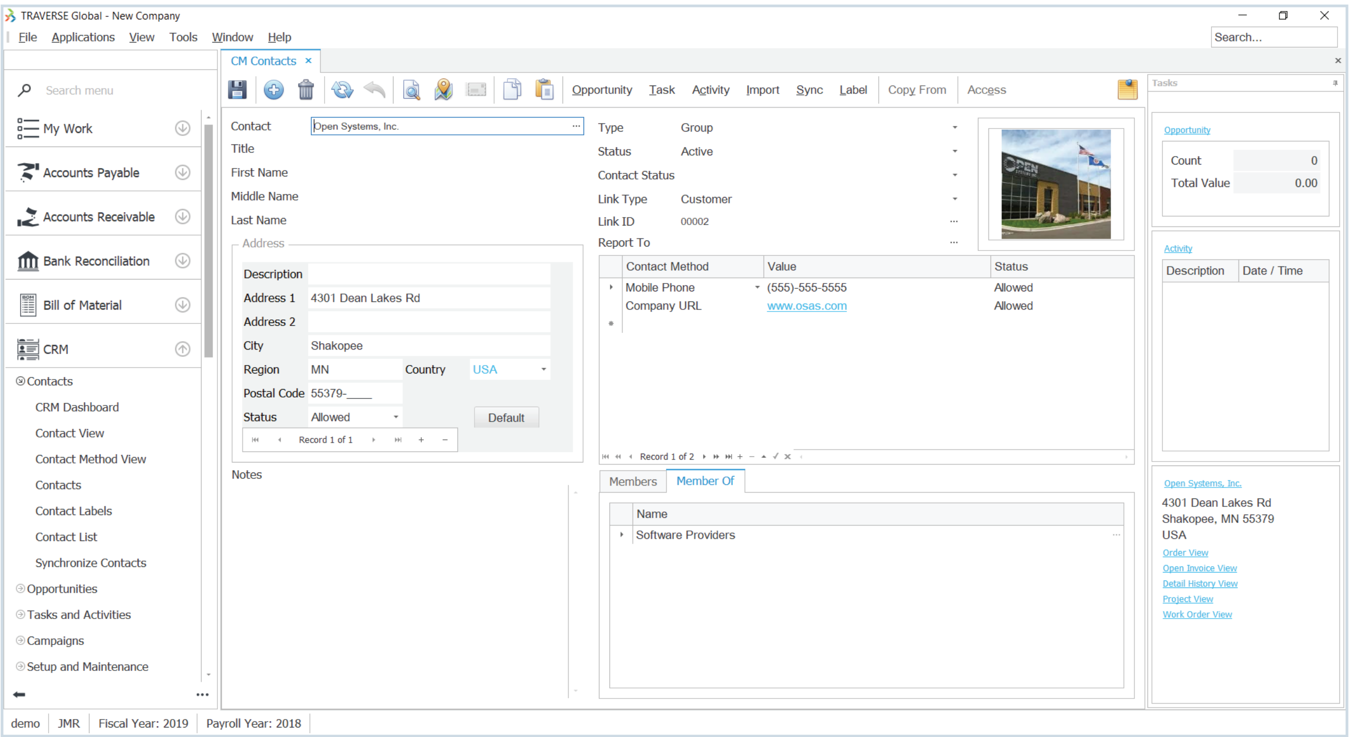
CRM – Customer Relationship Management

Business and sales opportunities happen anywhere and everywhere, so you need to have critical contact information at your fingertips when opportunity finds you. Traverse Customer Relationship Management (CRM) gives you complete control of your contact information whether you're at your desk or miles from the office, browsing email or on the road.

No matter how your employees connect with the office, Traverse CRM provides deployment options to give your team access to the information they need, tailored to fit their role. Integration to other Traverse applications provides access to a wide range of information, while providing the security necessary to keep your data safe.



Take advantage of the rich sales, vendor, employee, and marketing data in your Traverse system without changing programs or even screens. Easily maintain contact information, opportunity, task and activity tracking, campaign data, and share it with your organization.

- **Maintain unlimited contact names, communication methods (phone, email, fax), and user-defined fields for contacts.**
- **Receive, categorize, and refer opportunities, and analyze your campaigns by optionally assigning values and references.**

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CRM - Contact Relationship Management

Contacts

- Link Contacts to Traverse customers, vendors, and employees or non-Traverse entities, such as prospective clients or new hire candidates.
- Establish flexible affiliation relationships between contacts, such as employees within a company, partnership or corporate structure.
- Import, export, and synchronize select contact information.
- Access open orders, history, and other Traverse information.

Campaigns

- Define what a campaign means to your organization - including trade shows, internal training initiatives, vendor bidding, new product launches, and more.
- Obtain campaign analysis reporting, including cost, value and profit traceability.
- Interface to Traverse Project Costing for cost tracking.
- Predefine contact groups and message formats for quick and easy communication.

Opportunities

- Expand beyond customer sales with flexible utilization that includes benchmark goals for employees, vendor review and RFQ processing, potential new hires and sales driven opportunities.
- Track win/loss probability, resolution status and associate opportunities with contacts and campaigns.
- Add estimated value as well as target open and close dates.
- Obtain inquiries and reporting based on description, probability, resolution, value, date, and more.

Tasks

- Define task types that make sense for your business and processes.
- Create personalized task lists with interactive task management screens.
- Monitor near due or past due tasks that have not been completed by contact, user and more.
- Assign task follow-up actions and dates.
- Assign tasks to other users and track tasks to be completed by general teams.
- Manage task status, priority and due dates by contact, user and more.

Activities

- Preview a complete CRM history of relationships with each contact
- Assign label printing or bulk communication activities to contacts or campaigns.
- Create user-defined fields for activities.

General

- Flexible workflow that can be configured around your processes.
- Scalable processing that allows you to get up and running quickly.
- Attach unlimited documents and files.
- Optionally control access to contact information based on user.
- Email, Print, and fax individual and bulk communications internally or externally.
- Automatically save user preferences for filters and pick screens.