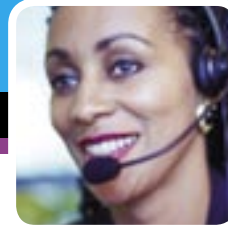


Product overview

Secure CRM



All businesses need to maintain some form of contact database. At its simplest form it is a spreadsheet or table with a list of names, company names and contact details. These details will have been collated over time from business cards, correspondence and business transactions.

Frequently each sales, marketing, accounting, purchasing, service and customer support department will have their own contact list. Often individuals will have a separate list of individual contacts, many of whom although important to the parent organisation will not be recorded on any formal list.

A Contact Management System attempts to integrate these official and unofficial lists and track communication events such as meetings and important correspondence and 'phone calls.

A CRM (Customer Relationship Management) solution is a significant step-up from a simple contact management package as it integrates calendars, diaries, action plans, meetings and outcomes into a single comprehensive data base.

Although most CRM packages will allow contact details, meeting and events to be tagged as private to the record owner the great benefits come from linking up the whole corporate contact database and integrating it to the sales order processing and accounting systems so that a comprehensive real time view of the customer can readily be brought to hand. Topics such as sales order history and payment patterns can readily be accessed prior to scheduled visits or even during the course of a telephone conversation.

Marketing promotions, sales leads, prospect management and conversion strategies become the real value added opportunities from implementing a CRM solution.

Secure Virtual Office will support any software package that will run under Windows operating system. The primary product on offer is ACT which integrates easily into Sage Instants and Sage Line 50 products. Please contact us for prices on any other CRM packages. Prices vary according to the supporting services selected.

Prices are for a monthly subscription and exclude VAT which will be applied at the standard rate. There is also a set-up fee which is equal to one month's subscription. Prospective users can register on line and payment is made by direct debit. As soon as contact and bank details have been registered your application will be processed. There is no limit to the number of users that can be registered at each application. Minimum contract period is six months but there is a 30 day no quibble money back guarantee. For further details about our no quibble guarantee please contact us.

Please allow 4 working days for the application to be processed. You will be sent an e-mail confirming receipt of your application and another one to confirm that the application has been successful. Each registered user will receive a letter confirming user ID and PIN. On first registration the user will be asked to enter and confirm a password. The system will prompt users to change their password every 90 days

Applicants will be able to start using the software 4 working days after submitting their application. The first month's subscription will only charge for the number of days remaining after the software has been made available. Thereafter, the subscription will be debited on the first of the month or on the next working day if the first of the month should fall on a weekend or a bank holiday.



Additional FAQ

How does a user logged into a CRM package access the rest of the MS Office applications? A user logging on to secure CRM is automatically logged into their primary profile. Other windows applications are available through left mouse "clicking" "Start" on their task bar. Available applications are presented according to permissions granted on the users' profile.

Why do I have to wait 4 working days before a replacement user becomes active? The new user has to be issued with a new user ID and PIN. For security reasons this is always done through the postal service to reduce online masquerade or identity theft.

I have just bought the latest release of XYZ CRM package. Can I have it installed on your server? Yes. If the CRM package will run under MS Windows we can arrange for your applications software and files to be uploaded to the secure CRM data centre. Once arrangements for the transfer have been agreed the transfer can normally be completed within a few hours. If you would like further details about this please contact us.

