

Soffront CRM Components

Soffront offers an integrated web-based CRM solution spanning marketing and sales force automation; Quotation and Order management, customer service and employee help desk functions of your organization. A Soffront CRM system is composed of the CRM Server Suite, plus any combination of other modules. These modules are all integrated and together form a comprehensive and powerful integrated CRM system – unparalleled in the industry.

Soffront CRM Server Suite:

- **CRM server** includes the three-tier web application, user setup and security tools, powerful query and reporting engine.
- **Customization Tools and Workflow Engine** allow a non-programmer to add database tables and fields, create and manage views of the data, and to create and manage workflows for all CRM processes.
- **Business Rules Engine** provides a robust facility to manage rules for various actions/non-actions such as email notification rules, escalation rules and assignment rules.



Sales Force Automation

- **Sales Force Automation:** Manage and track Accounts, Contacts, Opportunities, Forecasts, and Activities for customers and sales prospects. Manage your Sales Teams and forecasts. Create, print and email quotes.
- **Leads:** This module includes a customizable lead submittal form for your website that is integrated with the Soffront CRM, as well as a Leads module, where new leads can be qualified, and, as appropriate, “Promoted” to an account and assigned to sales reps according to the assignment rules.



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Marketing Automation

- **Marketing Automation:** Plan, create, run and monitor multistage Campaigns – using email or direct mail or telemarketing. Create, send, measure, and manage opt in/out status and bouncebacks for email campaigns and newsletters. Create, print, mail, and measure direct mail campaigns. Create and manage telemarketing campaigns. Schedule campaigns and run Campaign ROI reports.

Sales order management

- **Customer order processing:** Create orders from quotes or from scratch. Approve and fulfill orders. Create Link to accounting software such as QuickBooks, Great Plains and others to create invoices and receive payments. Import invoices and payments to CRM (as much information as needed for the sales, marketing and support staff).
- **Inventory Management:** Manage inventories, purchase orders, and receive materials from purchase orders into inventory.
- **Sold products:** Track sold products. Execute campaigns to up sale and cross sale.

Customer Service

- **Customer Service:** Enter, track, manage, resolve, respond and escalate customer support tickets. Track, monitor and renew Customer Service Agreements. Track time spent on support tickets. Create reports for customer billing.
- **Email Response Engine:** Create support Tickets from inbound email. Parse email for keywords, autorespond with KMS links to possible solutions. Auto assigns Tickets. Setup Notification and Escalation rules.
- **RMA:** Enter, track, and manage RMAs. Enter, track, and manage Work Orders needed for RMAs. Track time expended.
- **Customer Survey:** Create, and execute web-based Customer Surveys. Track responses.

Knowledge Management

- Publish, manage contents and provide access to Knowledge Management System for support agents, engineers, employees and customers.
- Create Knowledge article from email.
- Respond to incoming sales or support enquiries automatically.

Defect Tracking

- Enter, track, and manage product defects (that may be associated with Customer Support Tickets) and feature requests. Track time expended. This module links engineering to customer service. Integrates with Perforce and Microsoft Visual SourceSafe.
- Manage test cases, scripts, and procedures. Link to testing tools.
- Analyze defect trends and estimate release dates.



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Employee Support

- **Employee Helpdesk:** Enter, track, manage, resolve, respond and escalate employee support tickets.
- **Asset Management:** Enter, audit, and track employee and other related assets, such as computers, software, etc.

CRM Portal

- **Customer Portal:** Provide your customers with a secure entry-point from your web site, where you allow them access to selected customer information (like customer support tickets, RMAs, order status, etc.). Provide easy access to other information like company news, product information and downloads.
- **Partner Portal:** Provide your channel partners with a secure entry-point from your web site, where they can access and update information on Leads, Accounts, Contacts, Opportunities. Provide easy access to other information like product information, price lists and downloads.
- **Employee Portal:** Provide your employees with a secure entry-point from your web site, where you allow them access to selected employee information (like Helpdesk tickets, etc.). Provide easy access to other information like news, company and employee information, and downloads.

Soffront Mobile

- Connect your CRM system to PDAs and wireless mobile devices: Palm OS, Windows CE, or WAP devices such as cell phones.