

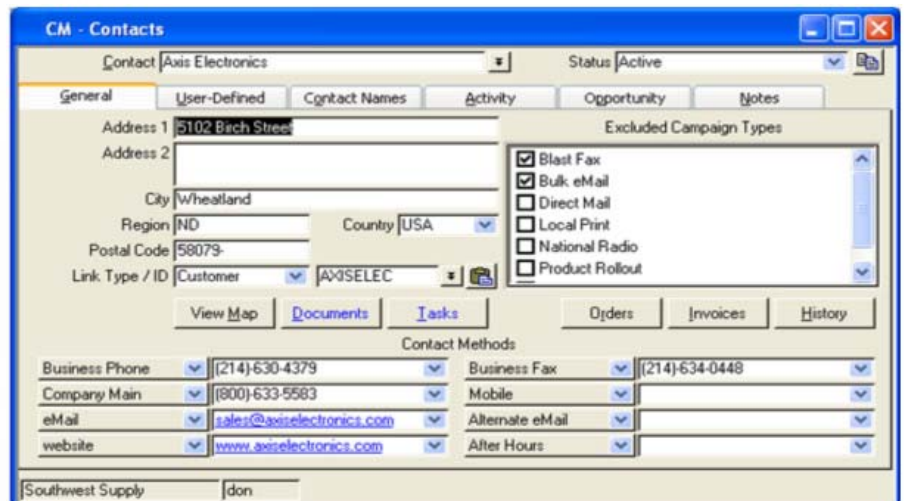
## CRM

**Manage the complete sales cycle; record all activity related to your customers, vendors and other key business associates**

Nowadays it's not enough simply to have customer and vendor records, you need to have complete information relative to activities, tasks, and to-dos. You can maintain unlimited contact names, contact methods (phone, fax, email, etc) and user-defined fields for contacts and contact names. The user defined fields allow you to set up and identify those data elements that are key to your marketing and sales campaigns. You can also maintain unlimited notes regarding the customers and vendors and your activities with them.

Intrust Win CRM will guide your sales team through every aspect of the sales cycle, enabling them to qualify the sales opportunities, and record the activities and tasks required to follow-up and close those opportunities. CRM provides a number of tools to aid the sales team including access to customer history, open invoices and sales orders and the ability to attach documents to the customer record.

Integration to Microsoft Outlook allows your staff to update tasks initiated in Intrust Win CRM to the Outlook Calendar and set up reminders.



The screenshot shows a software window titled "CM - Contacts" with a contact record for "Axis Electronics". The window has several tabs: "General", "User-Defined", "Contact Names", "Activity", "Opportunity", and "Notes". The "General" tab is active, displaying the following information:

- Contact: Axis Electronics
- Status: Active
- Address 1: 5102 Bach Street
- Address 2: [Empty]
- City: Wheeland
- Region: ND
- Country: USA
- Postal Code: 58079
- Link Type / ID: Customer
- AVSELEC [Icon]
- Excluded Campaign Types:  Blast Fax,  Bulk eMail,  Direct Mail,  Local Print,  National Radio,  Product Rollout
- Contact Methods: Business Phone: (214) 630-4379, Business Fax: (214) 634-0448, Company Main: (800) 633-5583, Mobile: [Empty], eMail: sales@axiselectronics.com, Alternate eMail: [Empty], website: www.axiselectronics.com, After Hours: [Empty]
- Buttons: View Map, Documents, Tasks, Orders, Invoices, History
- Footer: Southwest Supply | don

Maintain contact information for customers, prospects, and vendors