

# CRM Solutions

## from South West ICT

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## Summary of Products Supplied

	<p><i>easyCRM is for the serial networker. Never lose those business card details, never forget to follow up opportunities and start proactively marketing to your contacts today, all for just £249.00 per annum</i></p>
	<p><i>SugarCRM Community Edition is the World's leading Open Source CRM solution. For small to medium sized businesses looking to keep on top of their sales pipeline and customer service operation, SugarCRM leads the market. From £500 per annum SugarCRM CE comes with a free unlimited user license</i></p>
	<p><i>info@hand is a comprehensive suite of business management tools that includes extensive CRM capabilities as well as providing a rich set of accounting functions. info@hand comes with a customer portal providing your customers with direct access to view and update key information held in your info@hand system (e.g. create a helpdesk issue, update contact details)</i></p>
	<p><i>info@hand for QuickBooks Pro completes the 360 degree business cycle by seamlessly sharing information between info@hand and your QuickBooks finance system. At a push of a button, sales quotations become invoices which become ledger items in QuickBooks.</i></p>

All solutions are installed and supported through South West ICT. Linux-based web servers are provided and optimized which means that your users have trouble free computing. All they need is a web browser and access to the Internet.

System availability is 24 hours a day 7 days a week 365 days a year with a guaranteed uptime of 99%.

## What is **easycrm**?



**easycrm** is a web-based sales, marketing and customer handling application. The application is based on the well known SugarCRM Community Edition but has been heavily customized by South West ICT to suit a small business or networker. It is the ideal choice for a business that needs a simple, easy to use, contact management solution to address the following business needs.

- A place to keep names and addresses of people you have met
- A system to record notes, meetings, conversations with people
- A reminder system to prompt you to call people
- A way to categorise people into 'target' groups
- An email marketing facility providing the ability to create marketing templates, attach target groups, send mass emails, track bounces, click-thrus, opt-outs etc.
- A calendar facility to keep track of your appointments. Appointments can be linked to people in your database so that past activity with an individual can be found quickly and easily.
- A group calendar facility so you can see the diaries of your colleagues
- An email solution that sends and receives email. Again these emails are automatically linked to people in your database where applicable

The great thing about **easycrm** is that you won't outgrow it! As your needs expand so will **easycrm**. You begin with a heavily cut down feature-rich application that can grow by simply 'switching on' new features or installing standard components. So if you need to track sales, create quotations, run projects or implement a customer helpdesk solution, its **easycrm**

All you need to get started is a web browser and Internet connection. Place your £249.00+VAT purchase via credit card or PayPal and South West ICT will install your very own **easycrm** and contact you with the web location and your secure userid and password.

## Features & Pricing Options

Description	EasyCRM	SugarCRM Community Edition	info@hand CRM/ERP	info@hand CRM for QuickBooks Pro
Price	£249 pa Unlimited users	£500 pa Unlimited users	£195 per user £99 pa per user	CALL
web-based	•	•	•	•
create and view organisations and contacts	•	•	•	•
sales enquiry management	•	•	•	•
contact profiling and selection	•	•	•	•
activity tracking and follow up reminders	•	•	•	•
note taking	•	•	•	•
send/receive emails and link to contacts	•	•	•	•
email marketing / templates	•	•	•	•
Social networking integration	•	•	NA	NA
QuickBooks Pro integration				•

### Optional Extras

Keep it simple at first and use the basics above before buying or using the following options. When you outgrow the basics you have an upgrade path so your investment is future-proofed! Prices are one-time charges to cover installation and/or configuration time.

Sales opportunity tracking	£50	•	•	•
Quotation production	£50	£50	•	•
project management	£50	•	•	•
Time recording	£150	£150	•	•
Contract management with helpdesk	£50	•	•	•
Invoice production	£150	£150	•	•
Report writer	£150	£150	•	•
Telephony integration (VOIP)	£150	£150	•	•
Data export capability	£100	•	•	•
Mass update capability	£100	•	•	•
Workflow engine	£150	£150	•	•
MS Office integration <sup>i</sup>	£	£	£	£
MS Outlook Professional integration <sup>ii</sup>	•	•	•	•
Mobile/PDA synchronisation <sup>iii</sup>	£	£	£	£
Custom form for website (e.g. Enquiry capture) <sup>iv</sup>	£100	•	•	•
Mass Add to Target list	£150	£150	NA	NA
Custom fields pack 1 <sup>v</sup>	£100	•	•	•
Custom fields pack 2 <sup>vi</sup>	£100	•	•	•

<b>Services</b>				
Installation	•	•	•	•
Customisation	NA <sup>vii</sup>	£	£	£
Training services	£	£	£	£
Telephone support	10 incidents per annum	10 incidents per annum	3 incidents per user per annum	3 incidents per user per annum
10-hour telephone support pack (option once all incidents are used up)	£300	£300	£300	£300
On-site support	£	£	£	£
Apply routine maintenance upgrades	•	•	•	•
Professional services	£	£	£	£

• = included

£ = Daily rates apply. Call for pricing

NA = not applicable / not available

### Notes

1. All prices are subject to change without notice, exclude VAT and are in pounds sterling
2. Expenses are charged at cost.
3. Mileage is charged at 0.50p per mile.

<sup>i</sup> MS Office integration comes in various forms and capabilities depending on your needs. Call to discuss options

<sup>ii</sup> Microsoft Outlook plug-in provides the ability to attach emails to contacts in CRM and to sync calendars and contacts between Outlook and CRM

<sup>iii</sup> Mobile/PDA support is available but dependant on make and model of PDA. Popular phones such as the iPhone is supported

<sup>iv</sup> Includes creation of JavaScript code that can be embedded into an HTML page to provide a form that captures visitors contact details. The details are added directly to the CRM database.

<sup>v</sup> Custom pack 1 includes the creation of up to 5 custom fields within the Accounts, Contacts and Leads tables

<sup>vi</sup> Custom pack 2 includes the creation of unlimited custom fields within all key table modules

<sup>vii</sup> EasyCRM is already customised to suit a small business / networker. Custom field packs are available as optional extras