



Features: Sales & Marketing

Sales Lead Management	Everything you need to manage the Lead process without the extra details required for a Prospect.
Sales Prospect Management	Promote a Lead to a Prospect to reveal extra fields and futures relevant to converting to a member.
Corporate Sales Management	Use the Organisations section to connect contacts to organisations and manage your corporate sales process.
Unlimited User Fields	Create a system that meets your needs by adding your own fields for text, numbers and lookups.
Field Validations	Ensure accurate data entry by flagging fields as compulsory and add rules for what can be entered and when.
Activity and Calendar Management	Manage your day with easy to use activity lists and calendars. Schedule and view activities for other users and record completed and attempted activity results.
User Defined Activities	Create your own contact system by creating and reporting on specific activity types e.g. cold calls, corporate sales, service calls etc.
Notes and History Tracking	Enter unlimited notes for each contact and keep track of activity with automatic history entries.
Simple Joining Process	Seamless integration with Membership - no need to rekey information and the sign up process can be completed quickly and easily.
Built-in Letter, Email and SMS Sending	Keep in touch with the built in word processor, email and SMS text generator. Send to single or multiple contacts, complete with full history tracking and permission management.
Automated Workflow Actions	Save time by automating your sales process - set conditions to trigger actions such as send an email, send SMS, schedule an activity or update a field.
Marketing Lists	Segment your contacts into Marketing Lists and manage letter, email and SMS campaigns with targeted communications.
Link Contacts	Connect contacts together and record the relationship - partner, friend, coach etc. Build up an accurate picture of your contacts and who they are linked to.
Multi-site Management	Manage multi-site operations by limiting access to individual sites or user-defined regions.
Multiple Security Levels	Safeguard your data and business processes with multiple security levels to ensure staff can only perform the functions they are allowed to.
Web-based Reports	Run reports for all aspects of your sales and marketing operations. Subscribe to automatic delivery and export to MS Excel or PDF.