

CRM Feature Matrix

Feature	Description	EntegrOS Smart CRM
	Automate call back times and dates	✓
	Record all notes and actions taken	✓
	Attach and link all documents and letters to lead record	✓
	Display scripts for accounts staff	✓
	Automate payment processing	✓
	Automate receipt production	✓
	Ability to change prices	✓
	Audit trail of changes	✓
	Automatically update accounting system	✓
	Automate production of purchase and sale agreement	✓
Reports	Leads call activity	✓
	Clients call activity	✓
	Analyse leads by lead source	✓
	Produce pipeline for each rep / team / department / office	✓
	Sales orders report for any time frame	✓
	Sales collections report for any time frame	✓
	Top salespersons report	✓
	Inventory detail report	✓
	Inventory status report	✓
	Cashflow report	✓
	Cost of sales report	✓
	Transfer pricing report	✓
	Automate commissions rates	✓
	Automate commission overrides	✓
	Produce commissions statements	✓

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EntegrOS Smart Apps CRM Feature Matrix

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Lead Administration	Enter lead sources	✓
	Set start and end dates for lead sources	✓
	Allocate lead sources to offices / teams / individuals	✓
	Import from csv / xls files	✓
	Distribute leads in bulk from lead pool	✓
	Route website leads to particular users	✓
	Lead pool analysis	✓
	Transfer leads from one user to another	✓
Templates	Create / edit user defined sales scripts	✓
	Link attachments to sales scripts	✓
	Link actions to sales scripts	✓
	Update sales probability % upon actions	✓
	Link email subjects to actions	✓
	Create different projects	✓
	Create multiple stages within projects	✓
	Competitors	Record competitors
Analyse competitors website traffic		✓
Products	Create multiple product categories	✓
	Create on-line store	✓
Price Lists	Create multiple price lists	✓
	Export to excel	✓
Vouchers	Create different vouchers for different campaigns	✓
Partners	Record business partners details	✓
	Integrate partner details to website	✓

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Feature	Description	EntegrOS Smart CRM
Exchange Rates	User defined currencies	✓
	Automatic updates from www.xe.com	✓
	Automated purchase & sale agreement printing	✓
Lead Processing	Lead details in Vcard format	✓
	Record and analyse demographic information	✓
	Automatically record event history	✓
	Automatically update sales probability %	✓
	Automate call back times and dates	✓
	Record all notes and actions taken	✓
	Attach and link all documents and letters to lead record	✓
	Display scripts for sales staff	✓
	Automate mail / merge / send process	✓
	Switch between different offices	✓
Order Input	Automatically update inventory	✓
	Automate discounts processing	✓
	Automate entry of referral information	✓
	Automate referral fee processing	✓
	Automate bulk ordering process	✓
	Automate resale process	✓
	Automate goods exchange process	✓
	Automate transfer to order processing	✓
Order Processing	Carry forward all info from lead & order input processes	✓
	Automatically record event history	✓
	Automatically update sales probability %	✓