Global Shop SOLUTIONS ERP SOFTWARE

We simplify your manufacturing.™

# Customer Relationship Management (CRM)

**Access everything you need to know about a customer or prospect – from one screen in real time.**

- Contact management
- Customer, vendors, prospects & suspects information
- Prospect management
- Add notes & schedule events
- Manage communication
- Send emails to contacts
- Manage sales opportunities
- Search capabilities
- Create tasks & view in calendar
- Create service requests
- View open RMA & create new RMA
- View cash receipts & adjustment history
- View aging & invoices
- View cash trends
- View warranty ship date
- Customer preferences
- Payment status & history
- Events & opportunities
- Campaigns
- Website information
- Map of the billing address
- Territories
- Versatile contact management screen
- Forecast sales
- Quoting details
- Sales quotes
- Sales history
- Sales goals
- Sale dollars
- Type of sale
- Orders
- Jobs & job status details
- Work-in-progress
- To-do lists
- Shipments
- Invoice information
- Credit rating & limits
- Reprint invoices
- Days outstanding
- Print statements
- Quality issues
- Sales pipeline charts
- KPIs & analytics
- Custom reporting
- Executive & user Dashboards
- Integrate with a variety of CRM software such as Salesforce, HubSpot, SugarCRM & more

## BENEFITS

- Accurately manage your prospect, customer & vendor records
- Easily identify new prospects/suspects, opportunities & leads
- Experience a high-level of safety & security for your customer & prospect data
- Keep your staff in sync while staying on top of business growth & potential
- Real time data in one screen to manage relationships