

Adapts to your needs

You have the option to customize the LogicBright CRM solution to suit your specific needs.

- Easily import your data from different applications like Act! , Microsoft Outlook, Excel or QuickBooks.
- Add custom fields to allow the data you need to be displayed and tracked.
- Add more online storage for only \$20 per 200MB a month!
- Customize how and what information you see by creating custom views and filters.
- Complete control of your records. Retrieve deleted data, add and remove users, assign different access permissions to records, set different field requirements and security clearance among users.
- Choose from different themes to give each user a different and customized experience.

Interactive Records

By interactive we refer to each record's relationship to any existing and new data that is viewable and accessible from anywhere within the LogicBright CRM solution. You can follow the trail of how each individual record is linked and retrieve all related data.

James is a software designer. He met Robert at an airport waiting for their flights and they exchanged business cards as they were discussing college football. James remembers that Robert was running a small CPA firm and was looking for new software. James entered Robert's information into the LogicBright CRM later that night as a possible lead.

Three weeks later it's time to re establish contact and pursue the opportunity. Problem is, James cannot find Robert's card or recall his last name. He knows that Robert was on his way home to

Atlanta that afternoon but no other information is available.

By going into the Leads section in LogicBright CRM, James can do a search by First/Last name for "Robert" and filter the results to the ones in the state of GA. He quickly sees the specific record, clicks on it and he is immediately presented with all the information that was on Robert's business card plus the note he placed in the Lead record with Robert's wife and children's names and favorite college football team. All the information James needs is there for him to pursue a possible new client.

File Attachments

You can attach any type of file and link it to a particular record. That file can then be accessed from either the record it is linked to or from the Files section where all of the user's files are available-regardless of which record they may be linked to.

Richard is an outside sales manager who is getting ready to visit his first opportunity in another state. He wants to print out the marketing material and price quotes created specifically for this sales opportunity. He accesses the contact's record and opens up the documents for review and to print out. He decides that the contact might also benefit from a detailed technical specifications sheet – he accesses the File section in LogicBright CRM and quickly locates the document and prints it out. He is now ready to head out



the door equipped with everything he needs to convert this Opportunity into a sale.

Sales Pipeline at-a-glance

Using LogicBright CRM as an administrator, you can view and control the progress of all your registered users.

Since most companies get 80% of their sales from the top 20% of their customers, David, the sales manager, is concerned that all sales activities at their largest account are being kept up to date. With three sales reps assigned to three different departments within the customer's organization, it's difficult for David to ensure the customer is getting the proper attention and assis-

tance. With Administrator rights he can log in and view exactly what actions were taken by each rep to maintain the account: he can see if calls were returned as promised, that quotes were relayed for the correct products, and assess the progress made to ensure that all sales opportunities are closed on schedule and quotas are met.

Map It!

LogicBright CRM incorporates a mapping feature in every contact information screen – this means that any address you enter or import can be mapped via Google Maps with a single click. This makes it easy to get to a client's new office and is great if you are traveling.



Customizable Home Page

Your Home Page in LogicBright is fully customizable to display the information you need at-a-glance. It can display information related to ongoing sales opportunities in various stages, reminders, top sales accounts, news, sports, stock quotes, etc. without the need to redirect your internet browser or further access the LogicBright CRM. Here's an example:

Richard, still away on business, logs into his LogicBright CRM account and is instantly presented with his customized Home Page.

He can see all his ToDo reminders for each of his accounts for the upcoming week sorted by importance and progress status.

He reviews a list of all his sales opportunities in each city (having added the Opportunity widget to his page), sorted by company and state, probability %, amount of the sale, even the expected

"close" date. He can even check recent game scores, weather information and news and stock tips from ESPN, CNN, NY Times, BBC and Yahoo!

All this information is available to him at-a-glance with a single click before he even moves his mouse!

Contact LogicBright

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Prefer email? Visit our website:

www.logicbright.com

Are you a Reseller?

Does your portfolio include a CRM solution that is both a quality product and also provides an excellent ROI?

LogicBright CRM is looking for resellers to recommend our solution, provide basic training if needed, and be the first line of support for your clients...

Take the next step and talk with one of our knowledgeable LogicBright CRM representatives.