



[www.sfafinity.com](http://www.sfafinity.com)

### A total 360° customer view for everyone in your organization

You've built your business from the ground up. Mainstream businesses like yours are the backbone of the global economy. But, now that you've outgrown personal contact and task management, you're ready for *business* customer relationship management — a real-world solution that can deliver comprehensive and consistent customer information, as well as rapid results sales force automation. You're ready to step up to a solution that meets your requirements today and will grow with you and your business in the future. You're ready for SFCRM - the complete CRM, team-based customer management solution. SFCRM makes it easy to introduce a new technology into your business. Getting your staff to adopt a new CRM system couldn't be easier. This is a solution that not only replaces your outdated or insufficient products, but is affordable and practical, as well.

### Driving your business to the next level...

SFCRM can be implemented out-of-the-box, offering the same benefits of sales and marketing automation previously available only to larger corporations, but at a fraction of the cost and time to get your entire team up and running.

Start taking those essential steps toward effectively tracking and improving all of your customer interactions. With collaborative contact management and visibility into your sales and forecasts, you can be more productive and more responsive to customers. With SFCRM, you can reduce the sales cycle by making the right information available to everyone on your team, from anywhere, at anytime. Manage customer information and communication more efficiently in three ways:

- Team-based account and contact management allows a single source of customer information to be accessed throughout the organization
- Ease-of-use equals less time spent learning software and more time servicing your customers
- Process automation helps shorten sales cycles and increase revenue opportunities

### Features

- Extensive Configuration to map your business processes to SFCRM
- Territory Management to map any territory segmentation method such as geographical, product category, people or simply map your own territory management with the ability to slice and dice further by product type, categories and classes
- Completely Internet enabled - works with any browser (IE, Mozilla, Opera)
- Sophisticated report generator provides the ability to generate precise top management, sales management and operational reports on the fly with the option to choose from a base of 100+ reports
- Integration to all Email servers including MS Exchange, Lotus Domino, Novell Groupwise, Generic POP3-SMTP or IMAP standards
- Works on all hardware platforms, supports all operating systems and all SQL compliant databases.



*“SFCRM is a real asset to American Systems Group. We are able to manage our sales cycle with ease, analyze our leads process, and automate literature fulfillment. We are better organized more focused on making the sale.”*

**Rito Banerjee, CEO, American Systems Group**

## Problem/Solution

### Does this sound familiar?

- Unorganized, decentralized customer information
- Wasted time through duplication of effort
- Too many inefficient manual processes
- Inability to predict sales
- Lack of visibility into the sales pipeline
- Lost revenue (potential sales opportunities are mishandled or lost)
- Lost credibility due to inconsistent, incomplete, or incorrect contact/historical information
- Sales staff are not motivated enough to close more sales because of lack of sales infrastructure

Unlike stand-alone contact managers, SFCRM collects and centralizes all information flowing through your organization, giving every employee the tools to focus on finding and keeping customers.

SFCRM helps businesses gather, store and analyze customer information to win — and most importantly retain customers.

### Focus more time on winning sales with complete contact history tracking

Obtain instant access to a complete customer view — gain visibility into all your organization’s interactions with customers. Having a single history folder reduces the time needed to research issues that may arise.

### Opportunity management

View the combined status of all your pending sales. See a graphical representation of the stages, close dates and potential revenue of your entire pipeline. With this one-stop look at the sales funnel for pending opportunities, you can link the right people and documents to the overall process.

### Document management

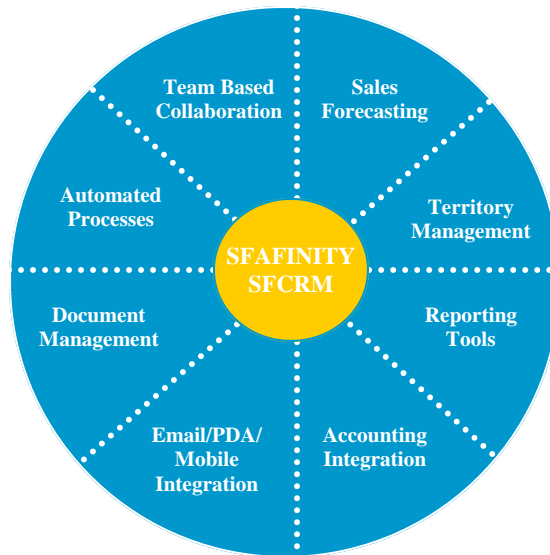
Keep track of your frequently used letters and e-mail templates, spend less time locating the right information to send to prospects and customers, and avoid sending duplicate information to the same person.

With SFCRM you can organize and store vital contact information. Additionally, SFCRM helps you stay on top of every detail to ensure that no opportunity goes unqualified.



## SFCRM - Features and Benefits

### Advanced account, contact, opportunity and activity management (CRM) for your business



Integrate with other core applications — SFCRM interacts with a growing list of other applications crucial to your business operations, including QuickBooks and Great

#### Automated processes

Streamline day-to-day tasks, freeing up your sales force to focus on additional opportunities and, with Web data capture, automate initial stages of customer qualification and communication. Define business rules, send customized and targeted marketing messages, automatically. SFCRM will even automatically send out notices reminding customers of expiring contracts or regularly scheduled maintenance.

#### Literature fulfillment

Schedule literature requests to individuals or groups of contacts, complete with appropriate cover letter, pertinent enclosures and delivery method — giving your sales staff more time to sell.

#### Analyze your team's effectiveness Sales & quota analyses

View forecasted sales, closed sales and comparisons between sales and quota with a click of a button — instantly get access to sales performance across your team without asking salespeople for reports.

#### Leads analysis

Track responses and determine which campaigns were effective — ensuring maximum return on investment.

#### Business Analytics

Quickly and easily view closed and lost opportunities, total calls and number of completed activities for each user.

#### Custom reports

Create reports to get the information you need, whether it's an account history or closed sales over customer lifetime.

#### Leverage the Internet Web data capture

Collect leads and information requests from your Web site and link with Automated Processes to reduce the need for manual follow up — instantly delivering pre-qualified leads to your sales team.

#### E-mail center

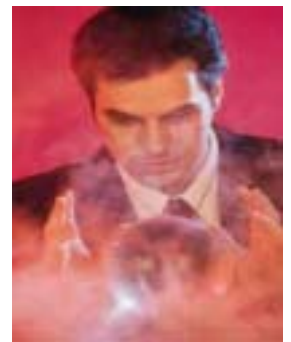
Send and receive messages from within SFCRM and automatically link them to a contact's record — take advantage of e-mail rules, enhanced searching capabilities, merge code support and e-mail templates for frequently used messages and personalized mass mailings.

#### Enhanced Outlook-mail integration

SFCRM works hand-in-hand with Microsoft® Outlook to manage e-mail messages from your Outlook Inbox and synchronizes e-mail messages, contacts, tasks and calendar activities.

*"At a granular level I can see which campaigns are working and which ones we need to review. At the business level SFCRM provides us with the data we need to make critical business decisions. Because data is available instantly, we can react quickly and adapt to market conditions."*  
Paul Stewart, Managing Director,  
AltaContact Ltd.

*"SFCRM has provided a common platform for customer reporting and information distribution which is critical to the success of our global business"*  
Chris Ithomitis,  
Director,  
Northwest Consulting Services, Inc.



*sfa*finity

# SFCRM Customer Relationship Management

SFCRM — Beyond Software As A Service (SAAS)



## Traditional model

SFCRM is available as a shrink wrapped solution from authorized Channel partners. In this model, SFCRM is provided as a software license and is installed in-house on hardware provided by the customer. Configuration/Customization services is provided by SFAFINITY or by the authorized Channel partner. Pricing is on a per seat basis and is affordable by most small to medium business.



**Tired of IT problems, administration, hardware and software maintenance?** SFCRM can be hosted at the SFAFINITY's data centers in San Jose or any authorized Channel partner's hosting centers or at any qualified colo center. Pricing is on a per user/per month basis and competes very well with contemporary SAAS providers.



**Do you want to have the benefits of hosting, but are insecure of putting your data at a hosting center?** SFAFINITY has the solution—an all-in-one CRM appliance that is installed on your premises. You have the option of paying outright or paying on a subscription basis (per user per month).



**Want to outsource backup, support and administration ?** SFCRM can be managed remotely and support can be provided without any requirement of in-house IT staff.

# *sfafinity*

1400 Coleman Avenue Suite F21  
Santa Clara 95050 USA  
Tel: 408-654-0400 Fax: 509-694-0220  
Email: [info@sfafinity.com](mailto:info@sfafinity.com)  
Website: <http://www.sfafinity.com>