

Conferenceware

Integration with Accpac

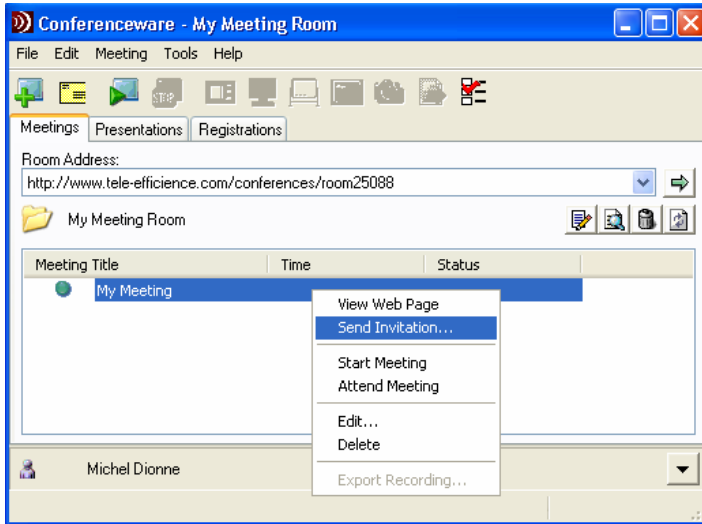


Tele-efficiency)))

Tele-efficiency is committed to helping our clients save their time, improve their synergy, and lower their traveling expenses. We offer superior WEBconference services at a fixed price under the trademark *Conferenceware*, integrated with most CRM applications and with Skype. Its interface is personalizable to the company. What's more, you can enjoy a free 30-day trial! Thereafter, you can continue enjoying the benefits of *Conferenceware* with a quarterly or an annual service contract.

From Conferenceware

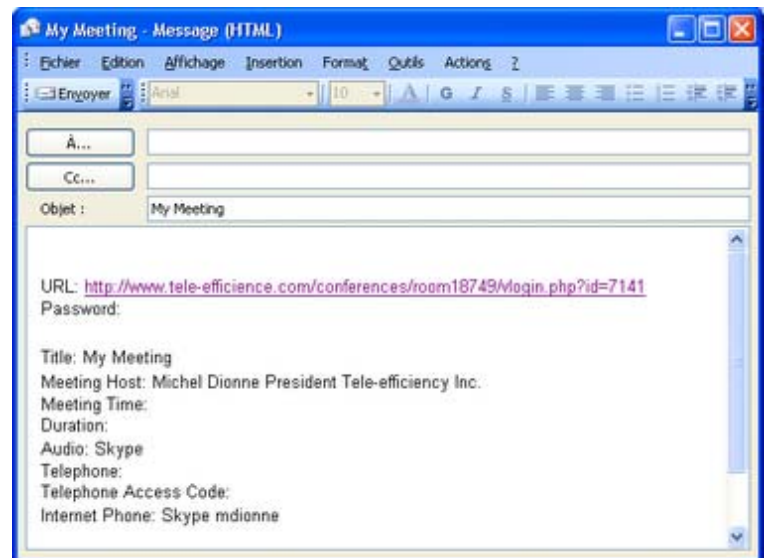
Conferenceware integrates with Accpac as your email client per default or via Outlook. In fact, it generates automatically the data for an invitation; description, agenda and voice broadcasting mode, in the template of a new email.



You invite the participants by sending an hyperlink to conduct them directly to the meeting. Click with the right button on the meeting's name, when selected the letters of the name will become grass and select *Send Invitation*.

Through your email client software

The information required by the participants, like the hyperlink to get to the meeting, the time and date, the necessary password, if that is the case, are already in the email information that opens within Accpac or Outlook.



Therefore, you only have to select people you want to invite amongst your contacts. Consequently, a copy of your invitation is saved with each contact file in Accpac.

To Accpac

eCRM



Tele-efficiency helps its clients to save time, improve their synergy and lower their travel expenses.

Offers WEBconference services at a fixed rate, under the trademark Conferenceware, integrated with CRM applications and with Skype. The greeting is customizable for each client's company image with their logo. Also offers a free 30-day trial period followed by a quarterly service contract or yearly.

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Introduction

The Customer Relationship Management is first of all and before anything else, a business strategy technologically supported and not the other way around. It consists on identifying the value of the clients, to keep them, develop them and get new ones. In this perspective, the prospecting of acquiring new clients begins with [WEBinar](#) while sales in itself, especially the presentation to prospects, is done in [eSales](#).

Preparation

Make the difference between the development of current clientele and market prospecting. In the first case, contacts are identified and are established in the client's account. Therefore, is convenient to organize a presentation since Conferenceware automatically generates the information required for an invitation, the description, schedule and the mode for voice broadcasting within the format of a new message. From there, you just have to select the persons you want to invite among your contacts. Consequently, a copy of the invitation is saved in each of your contact's file, in your CRM software. In the case of prospecting by [WEBinar](#), the list of registered persons is imported in CSV format in order to automatically build contact information in your CRM software.

Progress

The objective of commercial presentations is usually to get information regarding the prospect's business problematic and to identify the persons with power among the organization that have the weight to make the buying decision making. Is through the interactive questionnaire that is possible to evaluate the preoccupations in terms of problems along with the buying criteria of each of the persons influencing the process. While meeting with them, you are able to identify each person's role within the acquisition, user, evaluator, and their level of knowledge, beginner or expert as well as their attitude: ally, neutral or hostile. In the case of acquired clients, the interactive questionnaire is precious to evaluate their loyalty particularly their disposition to make referrals.

Follow up

The report of a reunion indicates not only the participants but also the answers they have provided to the questions submitted: problems, retained buying criteria, loyalty index. From there, you should be able to prepare a differential proposal, showing by the grade of pertinence, your understanding of the client's needs. Moreover, by recording a meeting, in which voice and image are synchronized, it can be replayed to check the fine tuning and be kept in the file as an attachment to opportunity.

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Outlook Integration

Sage Accpac CRM has complete, two-way synchronization with Microsoft Outlook contacts, calendar (appointments) and tasks, in addition to enhanced e-mail integration. You also have the option to use your entire Sage Accpac CRM system from within the standard Microsoft Outlook interface. Lastly, this comprehensive integration also enables you to synchronize your CRM data to pocket devices such as mobile phones and PDAs that synchronize with Outlook.

With the powerful integration, you can:

- Use all the features of Sage Accpac CRM entirely from within the Outlook interface; no more switching from one application to the other.
- Bi-directionally synchronize contacts, appointments and tasks between Outlook and Sage Accpac CRM.
- Perform one-way export from Sage Accpac CRM to Microsoft Outlook.
- Send e-mail within Sage Accpac CRM using Outlook and automatically have the e-mail stored in the relevant customer contact history, including attachments.
- Easily import e-mail from Outlook into the appropriate customer contact within Sage Accpac CRM.
- Choose which contacts and calendar items flow between applications, allowing you to work the way you want.

Benefits of Microsoft Outlook Integration include:

- Improved customer service; all customer communication can be tracked in the CRM system even as employees work from Outlook.
- Enhanced efficiency and increased productivity; employees can have faster access to vital customer information from within Outlook.
- CRM implementation success; internal staff adoption rates are higher as staff can use the CRM system from within the familiar Outlook interface.

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