

# Liaison CRM 5.0

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## Key Features

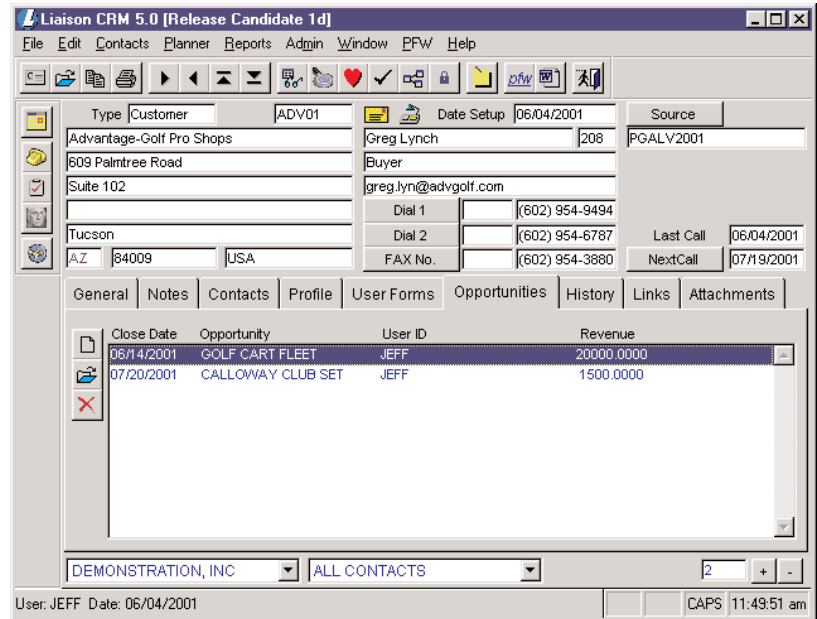
- Live, bi-directional synchronization between Sage PFW and Liaison CRM allows you to turn prospects into customers, update credit info and more without entering Sage PFW.
- Streamline your credit and collection procedures.
- Pull-up customer's billing & payment history.
- Generate real-time aging reports - summary or detailed.
- Lookup open orders including line item detail.
- Retrieve customer's complete order history.
- Review sales history by product / customer.
- View customer profile with one mouse click.
- Fax letters from Liaison with WinFax PRO.
- Attach date and time stamped notes to inventory items.
- Produce a summary of items sold by customer.
- All this without ever opening Sage PFW!

## Let Liaison CRM For



SAGE PFW

## Bring Your Organization Together

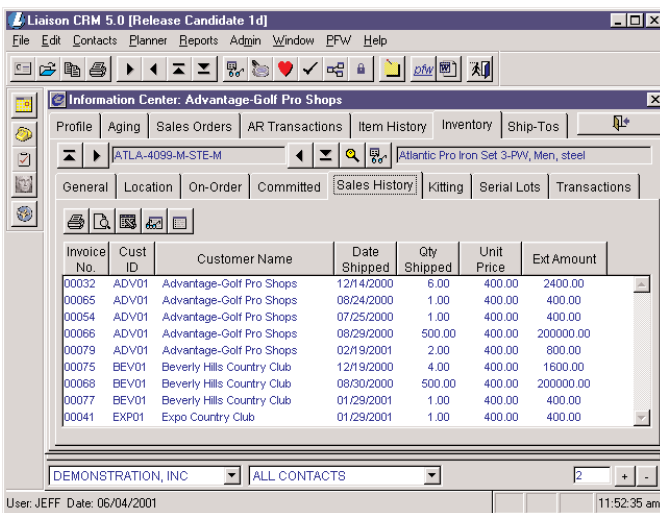


Having the right information when you need it is crucial to providing the best in customer care. Liaison CRM 5.0 for Sage PFW takes the guesswork out of this important element of business.

Empower your entire organization with the ability to communicate from one common platform. Store and access critical financial, sales and marketing information from within one application. Accounts Receivable and Collections can now share the same information with Customer Service, Sales, and Marketing departments building a solid team aimed at customer care.

Sales and Customer Service will have access to real-time order entry, order history and inventory information without toggling over to Sage PFW. Two clicks of the mouse and the customer has their answer, 'yes the order shipped yesterday'.

Liaison CRM was engineered to keep customer records in Liaison in-sync with customer records in Sage PFW. When a company name or address is changed in either system, the corresponding fields are automatically updated in the other system. This unique bi-directional design keeps Liaison and Sage PFW in-sync, real-time and accurate.



Drill down into inventory information like On-Order, Committed and Sales History. Run item history reports that not only show who ordered a particular item over a specific period but more importantly... who did not! A great tool to ensure customer retention and increase sales.

## Features & Benefits

**Document Management** - Maintain links between company records and important documents with Liaison CRM's new attachment capabilities. Link, launch, and maintain any OLE compliant document directly to any company record.

**Opportunity Management** - Track and monitor future sales. Manage salespeople and departments with detailed "pipeline" reports sorted and filtered by Items, Revenue Opportunities, Closure Probabilities, Lead Sources, etc...

**Inventory Access** - View, retrieve, and print any Inventory Item master, location, kitting, and transaction file from within one screen without ever opening BatchMaster.

**Liaison Office Suite** - Liaison CRM 5.0 has been completely integrated into Liaison Messenger 3.0 and SalesSonar 1.0 and vice versa to complete the perfect Customer Relationship Management system for your organization.

## Accounting Information Has Never Been So Accessible!

### OE Access

- View open and shipped order detail directly from within CRM
- Print, preview, and export Open Sales Order listing
- View, print, and export Sales History for any customer

### Inventory Access

- Retrieve real-time Location information like On-Hand, On-Order, and Committed Quantities
- View open and closed Purchasing History for any item across all vendors
- View open and closed Sales History for any item across all customers
- Maintain date and time stamped notes on every item master.

## CRM Functionality at its best ...

- Create letter and mail merges with Microsoft Office integration.
- Link important files (.doc,.xls,.pdf, etc.) to a customer and/or prospect and retrieve them with one click of the mouse.
- Link companies with other companies.
- Create unlimited # of user defined forms.
- Get directions using expedia with one click.
- Unlimited size of note pad.
- Multiple notepads per profile.
- Rate system for prospects and customers

### AR Access

- Retrieve, preview, print, and export Customer Aging reports
- Drill down capabilities for complete Customer billing and payment history
- Generate Liaison Collector statements

### Messenger Integration

- Retrieve, Print, Reprint, Fax, E-mail and Sales Order, Invoices, Purchase Order, and Statement directly from within Liaison CRM 5.0.
- Update Liaison CRM history and notepad files with Print and Post transactions

### All from within one screen....

- Schedule follow-up calls or hand off a call to another Liaison CRM user.
- Manage and monitor sales opportunities.
- Get directions to customer location using Expedia
- Create unlimited number of user defined forms
- Attach and manage Word, Excel and PDF files to a profile.
- Create custom reports within minutes!

## System Requirements:

- All version of Sage PFW thru 5.6
- ALL versions of BatchMasterPFW thru 5.6
- Windows 95, 98, 2000, 2003, NT, XP, Vista

## Messenger integrates with other Liaison Products!

**Liaison Messenger™ 3.0** - Create actions within Messenger that will schedule recall dates for employees and document activities within the CRM notepad. A Great tool to use with the management of aged receivables!