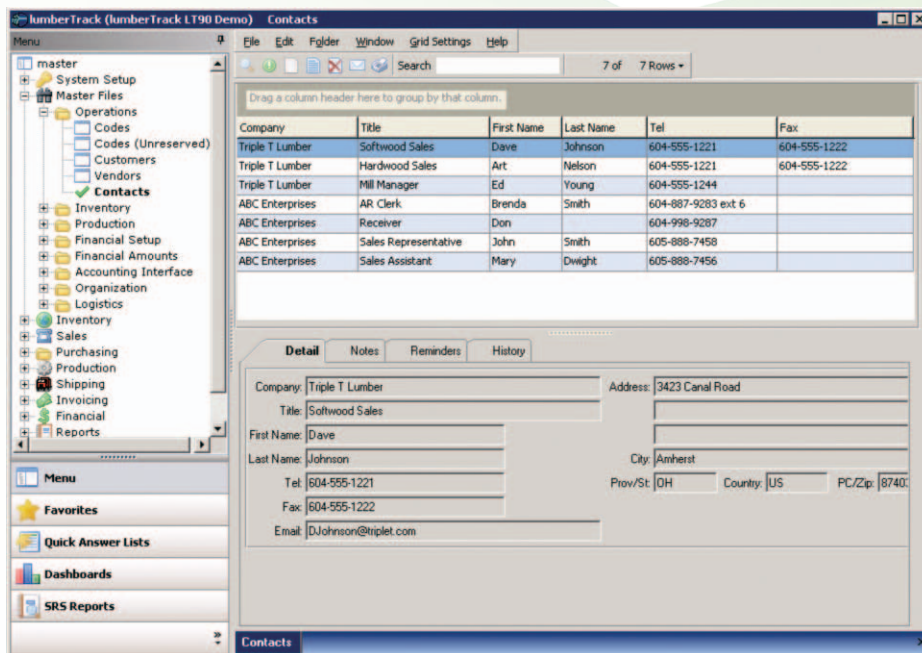


## Customer Relationship Management (CRM) Module

lumberTrack contact management software makes it easy for wood products suppliers to manage prospects and customer relationships. You will notice benefit from improved customer responsiveness leading to higher sales, while making the most efficient use of your sales, marketing, accounting and administrative staff.

- **Integrate contact management.** Track your prospects, customers and suppliers in the same system, with complete contact information, communications history, notes and reminders.
- **Increase sales.** Develop prospects and turn them into new customers. Promote complementary and new products to customers, create reminders to follow up on inquiries and quotes, and view a customer's complete history to negotiate the best deals.
- **Improve customer responsiveness.** Quickly look up product availability, customer purchase history and account status all in the same system to provide prompt and accurate quotes.
- **Improve order turnaround.** Improve the pace of order fulfillment by having contact management integrated with your sales order and inventory control system.
- **Improve customer service.** Instantaneously access order and delivery status. Create reminders for follow-up calls to ensure customer satisfaction and for follow-on sales.
- **Coordinate internal communication.** View notes entered by your entire staff so that customer communication is shared amongst your staff as a part of lumberTrack automated workflow process.



lumberTrack CRM capabilities help you increase sales and get the most out of your customer relations.

## Customer Relationship Management Module (CRM) ...continued.

### Coordinate contact and customer relations management

lumberTrack provides a comprehensive environment for all your customer relationship management requirements:

- **Centralize contact information.** Store unlimited customer, prospect and supplier contacts, financial and credit data, and sales history in one centralized database.
- **Efficiently track customer communications.** Record notes from communications with the customer so that all staff members are informed of preferences, requests and future action items.
- **Be notified and prompted automatically.** Use lumberTrack Dashboard and Message Center (*see separate sheets for details*) to be informed and keep track of important system-generated and user-generated messages regarding orders and account status.

### Increase sales with information and automation

Your sales team will be more efficient and more effective using lumberTrack CRM capabilities to manage their day-to-day tasks. Here are some of the ways lumberTrack can help:

- **Develop new customers.** Track communications with prospects. Quickly generate quotes that are informative and price competitive with instant access to product pricing/costs and inventory status.
- **Turn quotes to orders.** Track outstanding quotes with reminders, and easily convert them to orders.
- **Speed the sales cycle.** Create reminders for yourself and other staff members of customer management actions required.
- **Email/Fax documents automatically.** Use integrated email/fax software to send documents to your customers and suppliers.

### Integrate automated credit management and collections

lumberTrack CRM and Message Center capabilities facilitate workflow processes associated with credit management and collections. Your accounting staff and customer service personnel can work together to manage accounts with knowledge, sensitivity and internal awareness.

Accounting staff can easily make customer service staff aware of actions taken, sending automated messages with notes to the customer service representative about disputed invoices and notices sent to a customer, plus requesting a follow up by a certain date.

### Manage unlimited supplier and other contacts

lumberTrack contact management capabilities can be used to store unlimited numbers of contacts for your suppliers and other contacts in addition to your customer contacts. Use all the same notes, reminders and direct links to email and fax to optimize your relationships with suppliers and other contacts.

**Progressive Solutions has helped wood products and building material companies from around the world improve their processes and their bottom line.**

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