# tradepoint™

**Tradepoint Enterprise
The Next Step in Business Software Solutions.**

accounting | contact management | ecommerce | email & collaboration | project management | retail point of sale | human resources | advanced reporting

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# Table of Contents

# The **Future** of Integrated Business Software Solutions Is Here . . . **Tradepoint Enterprise.**

## MODULAR ARCHITECTURE

| | | | | |
|---|---|---|---|---|
| Accounting | Ecommerce | Project Management | CRM | Collaboration |
| Human Resources | Extensibility | Retail POS | Team Sharing | Advanced Reporting |
| Global Access | Time Management | Budgeting | Inventory Management | Customization |

**tradepoint**™

Evaluate. **Plan.** Deploy.

**Tradepoint Enterprise is a Complete Business Management Software Solution**

Designed to improve performance and profitability by providing advanced tools to manage every area of your business. Streamline sales and manage your Customer Relationships with our CRM solution integrated with multiple tool sets such as Projects, Accounting and Supply Side Management giving you the tools to cultivate added depth to your relationships with your Customers.

For businesses looking to maximize their efforts through the web, direct sales, resellers and retail venues simultaneously Tradepoint Enterprise is the next generation of software for business management. Tradepoint Enterprise is a business management software integrating your company's email, schedules, projects, tasks into one system that is always updated for ALL of your employees. Imagine one single, complete business management software application which is actively updated and maintained simply by everyone using it for their business activities.

The Tradepoint Enterprise solution provides a platform to run and grow your business whether you are a single location brick and mortar store or a multi-national company with multiple locations, remote offices and a strong internet presence.  The Tradepoint Enterprise platform provides you with the tools necessary to manage your operations and also provides and extensible platform to customize the solution to meet your specific needs.

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## Tradepoint Enterprise the next step in Business Management Software

Tradepoint Enterprise is the first all-in-one software solution designed for businesses to meet the demands of today's challenging business environment. Built with multiple functionality modules including Accounting, Contact Management, ERP, Inventory, Team Sharing, Email, Collaboration, Project Management and Human Resources, Tradepoint Enterprise brings together in one software application the latest in functionality with fl exible tools for a software solution designed to enable growing businesses to succeed.

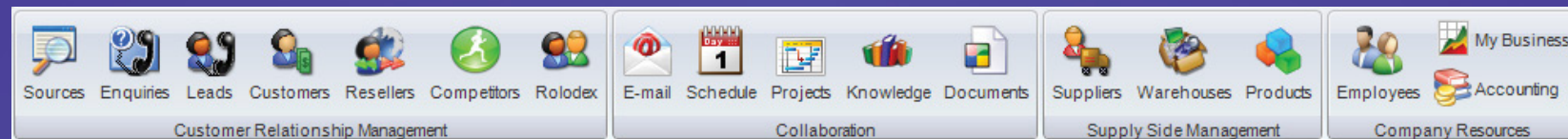Tradepoint Enterprise is built using the latest in 'Smart Client' technology with a triple 512k data encryption giving your business an exceptional level of security with the best of the internet without being dependent on the internet. Our Smart Client technology allows for secure, fl exible networking allowing for a minimum in hardware structures for a smaller faster network structure with fl exible options for off-site users.

Envision an environment where all of your business information is in one software solution. Envision an environment where Employees can fulfi ll their role using one application for all their responsibilities. Envision a solution where all Ecommerce activities are fi ltered into one solution without having to handle any double data entry or importing. Envision being able to process and track all your communication needs with only one software solution. Welcome to Tradepoint Enterprise, one solution for business. Your Business.

## Integration: Many Businesses. One Solution

As a completely integrated business management software Tradepoint Enterprise provides businesses with the tools to handle business processes from beginning to end, increasing  productivity and decreasing duplicity in actions and information. Since Tradepoint Enterprise includes multiple functionality modules, Tradepoint Enterprise does not require advanced customizations and costly integrations to tie together multiple applications for one unified solution.

With Tradepoint Enterprise, the vast majority of business applications are already included in Tradepoint Enterprise as an out-of the box solution making Tradepoint Enterprise an easy to use solution that does not compromise functionality. Tradepoint Enterprise offers an affordable solution for your company to bring all operations into one solution.

- • CRM/Contact Management
- • Accounting/Financial Management
- • Company Settings/Support for multiple organizations
- • Employee Settings to define the user experience
- • Email Client: Stand Alone or Synchronization with Outlook

- • ERP/Supply Side Management for Product/Inventory
- • Reporting/Document Management
- • Integrated Shipping Module
- • Integrated payment gateways
- • Point of Sale/Retail Module

| Customer Relationship Management | Collaboration | Supply Side Management | Company Resources |
|---|---|---|---|
| Sources  Enquiries  Leads  Customers  Resellers  Competitors  Rolodex | E-mail  Schedule  Projects  Knowledge  Documents | Suppliers  Warehouses  Products | Employees  My Business  Accounting |

## Graphical User Interface

Designed with the Microsoft Office interface for easy adoption and familiar usage, Tradepoint Enterprise's interface has an easily recognizable graphic interface. The tabbed ribbon-styled interface provides a streamlined user interface with in-depth functions. Right click options are integrated throughout Tradepoint Enterprise for easy definition of user preferences. Drag and drop tools are also present throughout Tradepoint for easy organization of information in just a few clicks.

- Microsoft Office tabbed ribbon-styled interface
- Drag and drop tools for dashboards and throughout Tradepoint screens
- Right click tools throughout Tradepoint for easy actions
- One click tools for numerous functions (i.e. from a Quote to an Order)

## Flexible Networking Structure: LAN or through the Internet

Most business software solutions are either web based or desktop based applications. Desktop driven applications can present challenges with information synchronization or easy access to information. Web driven applications can be slower depending on Internet connection with software elements having to download page by page in a browser.

Tradepoint Enterprise has brought together the best of both world with a fast, rich user interface that synchronizes business information to multiple users through the Internet without being dependent on the Internet. Taking this one step further is a triple 512k encryption level ensuring the security of information as it synchronizes through the Internet.

The result is a fast, secure software giving businesses flexible options for your company's networking structure.
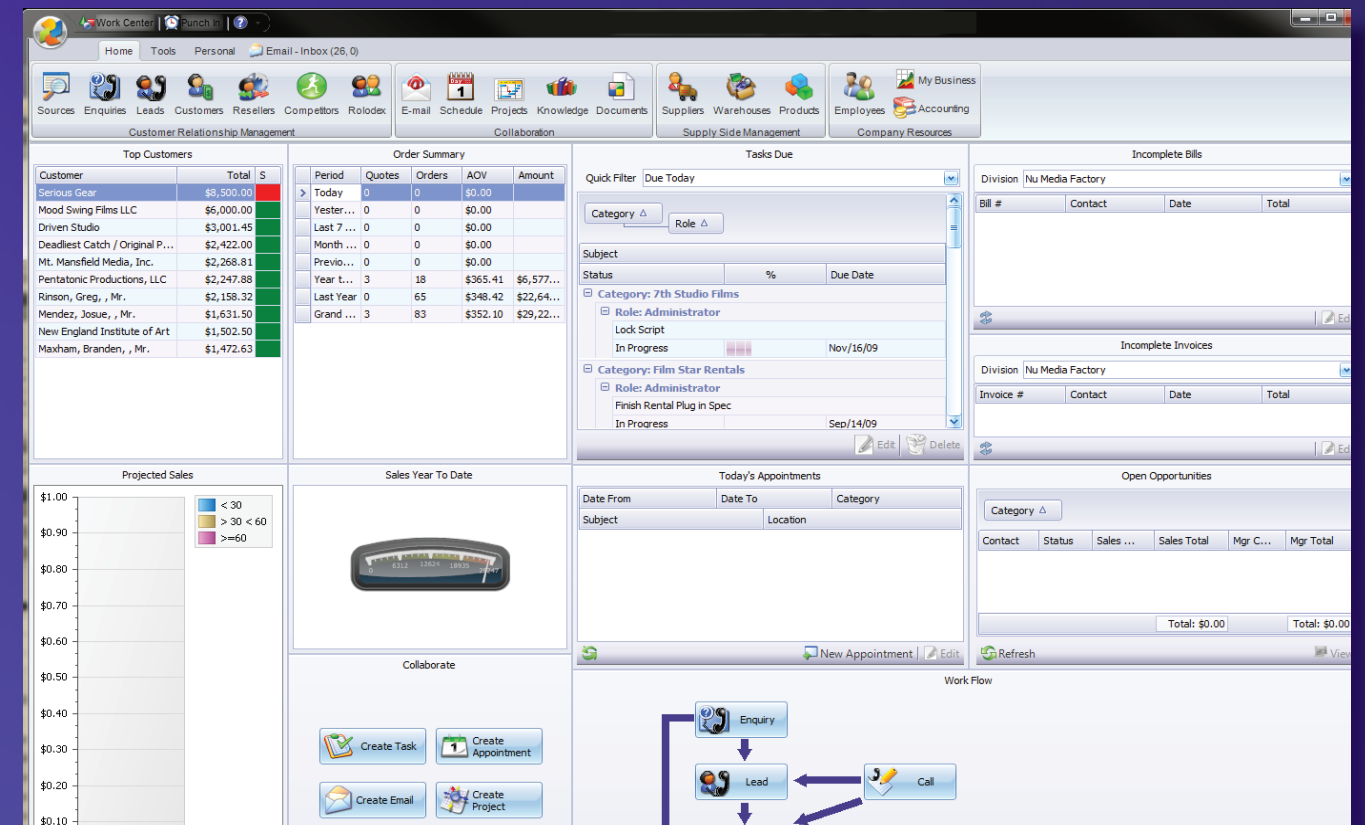
- Users can connect through a Local Area Network or via the web through a remote connection
- Faster than most web based applications with graphics downloading in a browser
- Easily connect with remote users and locations. Process orders from a showroom or conference
- Triple 512k security encryption and data compression for safe, fast information synchronization
- Integrated Database Management tools for generating backups and optimizing performance

## Customization: Plug-ins & Extendable Architecture

Even though Tradepoint Enterprise includes a wide variety of integrated tools, companies with specific workflow will utilize the customization tools and extendable architecture makes addressing those needs easier than most traditional applications. Even if the needs are as simple as adding new fields or changing the field labels (often referred to as 'tags') these are changes that can be performed easily using our Developer Kit and SDK.

More advanced customizations and Plug-ins including creating new screens and functions integrated into your Tradepoint Enterprise and even to our Ecommerce technology can also be designed and integrated into Tradepoint Enterprise without losing the existing functionality already present within Tradepoint. Our updating technology allows for easy releasing of updates, functionality and new versions of Tradepoint to customers even though some of them may have advanced plug-ins.

## Integrated Accounting for Small Business

At the heart of Tradepoint Enterprise is an integrated Accounting system designed to provide small and growing enterprises an Accounting structure combining easy to use tools with a GAAP compliant structure. Providing small and large enterprises alike with a core structure enabling companies to manage a combination of more than one separate company or a company with multiple divisions, each with its own respective General Ledger. Accounting functions within Tradepoint provide a sophisticated tool capable of managing diverse corporate structures with tools designed for easy daily use.

With complete audit trail capability and support for an unlimited number of levels of accounts within a General Ledger structure small and growing businesses can enjoy the security and capability of an enterprise level Accounting solution with an 'out of the box' business management solution. With Tradepoint's synchronization technology all users have real time access to the most up to date Accounting information enabling all users access to your Accounting data as business happens.

## Information and the Customer Relationship Lifecycle

Customer Relationship Management has evolved from a service oriented management methodology to a operating necessity for most businesses regardless of their size. Profitability and an organization's ability to evolve within ever changing business environments depends directly on the relationship a company has with all people that come into contact with a company, not just customers and partners. As a result, the relationship created and maintained with clients is the life force for a company as well as a springboard for future changes and growth.

Customer Relationship Management and the resulting Customer Relationship lifecycle can easily be maximized with Tradepoint Business Management Software. Tradepoint Enterprise provides a strong CRM solution relevant for a wide range of industries whether or not your company uses one of our integrated Ecommerce solutions. As part of an integrated solution, Tradepoint Enterprise CRM ties in with numerous sub-systems for a CRM solution extending well beyond the basic. The result is a scalable software solution with in-depth functionality enabling Tradepoint Enterprise to adapt to a variety of Customer Relationship Management needs.

Tradepoint Enterprise takes Customer Relationship Management the next step and provides several groups of tools that encompass most basic CRM functions with additional integrated tools providing more specialized customer processes within a robust CRM solution.

## Multiple Companies. Multiple Websites.

Ecommerce solutions have become a necessary part of most companies, even down to small enterprises complimenting sales channels and adding to any retail presence a company offers. Tradepoint brings numerous solutions to meet a variety of Ecommerce needs. Tradepoint Enterprise Ecommerce solutions address financial transactions as well as web portals offering businesses options for websites designed for customers, partners and contacts to provide a web portal to view, share and upload information through a website.

When a user creates an account at your website, the web portals can accommodate an unlimited number of users, with fully automated features. We have solutions supporting both one and multiple languages for companies looking to extend their web presence into multiple international markets.

Similarly our Ecommerce solutions for enabling financial transactions come with the web portal capability so customers and partners alike can enjoy a full functioning website for purchases, paying Invoices and establishing recurring billing for products and services with the ability to create and manage their own account through a website. Our solutions for full Ecommerce capability extend to both one language with one currency and to multiple languages and currencies for companies looking to achieve an international presence on the web.

## Integrated Tools for Collaboration

Drive sales activity with a CRM solution with integrated tools specifically for sales and related sales activity. With Tradepoint, companies using a direct sales channel will have numerous options for Customizable Sales Force Automation tools to address specific sales force automation needs. Tradepoint uses a combination of tools that all work together for an integrated approach to sales force automation (SFA).

Sales activity is all about expanding a customer base. To do that a sales force needs a spring board for easy access to ongoing actions, and the capability to go from a quick overview to sales actions easily. Tradepoint's Work Center and Flyout provide an ideal springboard for a multitude of sales related actions. Reminders and alerts serve as the alarm clock for action items coming due including Quotes, RFQs, Calls and Flagged Email so a direct sales force can continue prospecting and filling their pipeline with activity.

- User based profiles with adjustable tools within a Work Center Dashboard and Flyout Panel
- Reminders with a Snooze button option with different timers for events
- Drill down tools for easy access to in-depth information from the Work Center
- Quick Reports for Flyout Panel options
- Right click tools for easy completion of action items
- Hover over tools for easy viewing of contact information
- Customizable Employee preferences for Email, Schedule and profile information

## Human Resources Just Got Easier

Tradepoint Enterprise allows organizations to electronically document all Employee Data in one safe and secure place. With Security Levels based on Role and Position, employee data can only be accessed by those authorized. Management can easliy define qualifications, education, licensing information and certifications with easy to expand drop down menus and definable fields to shape each employee profile.

Measure staff productivity with Appointments, Tasks, and Team Projects which are automatically archived within the employee file. The power of managing all employee information is now at your fingertips."

## Projects Integrated with your Business

Designed for both small start ups and large enterprises, Project Management has moved from an external activity from most corporate needs to an active part of business. Project management has long been its own profession serving as a critical resource for companies going through a multitude of processes. Often Project Management has been utilized primarily by larger enterprises to manage growth. Project management has since been redefined in the last 10 years with many businesses of all types and sizes recognizing the everyday need for it within their own organization.

For companies who have a need for Projects and Project Management tools Tradepoint includes an integrated Project Management module. Tradepoint's Projects is integrated with CRM and Accounting capabilities making it an ideal business management software for smaller and medium sized growing businesses.

## Retail Solutions for Point of Sale and BEYOND

In today's economy, consumers and businesses alike expect to have everything at their fingertips. Easy to use, fully integrated solutions are a must. As the lines of commerce fade, it becomes essential for technology companies to provide products that are truly end to end. Organizations in every market want the flexibility to transact business in various forms, at anytime.

Retail operations looking to expand into the world of eCommerce, and eCommerce companies with retail operations, will benefit tremendously from implementing the Tradepoint solution. The platforms are extremely powerful for businesses as stand alone products, but together they provide a true end to end solution that can be customized for almost any vertical market.



Tradepoint allows you to manage business operations exactly where the transactions take place. Now you can simply create items once in the back office for both your web store and POS operations. Set up an inventory item, assign it a button on the POS touch-screen (or simply scan it), and you are ready to sell. Beyond retail, there is a vast market of businesses that have needs for integrated eCommerce, self-serve kiosks, membership/event, and facility management.

## Tradepoint Reporting Tools From Insight to Action

Maintaining a competitive edge in a challenging market relies on a company's ability to take decisive action at a moments notice. Being able to make decisions is closely tied to viewing your information accurately, quickly and being able to communicate that information with others. Tradepoint provides a software solution which can provide dynamically driven reporting to users based on their profile settings providing the ability to see, evaluate and respond quickly to an ever changing business climate.

Exactly as it is named, My Business is a reporting tool packed with dozens of reports on different aspects of business operations. Enabled through profile settings provide different levels of access to information based on an Employees role. Designed with flexibility in mind including drag and drop fields within these reports and right click tools for editing appearance and information creates topic specific reports reflecting your needs. Integrated collaborative tools make it easy to share reports with others through email options and file export tools enhancing the ability to make quick decisions as a company.

Embedded in Tradepoint's CRM is a Quick Reports option for contact based reports that can be run at a moments notice. Whether it is a list of contacts from a specific location or Mail Merge enabled mailing labels , Tradepoint's Quick Reports can deliver in just a few clicks.

## Customize & Design Tools for your Reports

All of Tradepoint's CRM Quick Reports and all Action based forms include a suite of customize and design options for each report and form. This allows companies to create highly specialized reports and forms reflecting the desired image a business wants to project to clients, partners and contacts. The customize and design options are also available for multiple companies and divisions within Tradepoint providing the capability for redesigning and customizing forms and reports within each Division and company within Tradepoint.

Found easily through a Customize icon in each Print preview screen within CRM Quick Reports and Action Based Forms the Customize Tool is packed with options for numerous tools for customizing specific elements of each report. Some of the most popular customization and design features include:

- Adding Images and Logos
- Changing colors of text, borders and backgrounds
- Customizing style sheet preferences for all reports
- Adding dynamically driven fields to reports
- Create custom Watermarks
- Support for rich text
- Create Charts within reports
- Support for bar codes with multiple symbology options
- Add static text to reports for policies and statements

## The Tradepoint Team is Ready to Help You
Please get in touch today to find out how to put Tradepoint Enterprise to work for your business.

Tradepoint Enterprise.