



## SUMMARY OF TRADEPOINT ENTERPRISE FOR WINDOWS CORE FUNCTIONALITY

### CUSTOMER RELATIONSHIP MANAGEMENT – OVERVIEW

#### CRM: Contact Structure

- Ribbon-styled tabbed toolbars for easy access to functionality with minimal clicking.
- Defined structure for different types of contacts within a CRM structure.
- Contact based display for existing Contacts for each Section of the CRM component of TradePoint Enterprise.
- Customizable Category & Status field for each CRM contact type for definition within your CRM process (this is any field that has a + sign to the right for easy access to the Setup & Configure Tool).
- Capability to automatically generate Account numbers or to define your own Account Numbering structure.
- The ability to Import data from a Third party source such as Harris & Harris Infosource for use with marketing campaigns.
- Business to Consumer Contact option for all Contact Types within the CRM portion of TradePoint Enterprise.
- Business to Business contact types available including the ability to hold multiple contacts per Business to Business contact.
- A window showing any outstanding balance within Customers and Resellers.
- Support for role based security profiles.

#### CRM: Sales Management Tools

- Event Management Tools for automated activity such as auto-responder emails and tasks based on your CRM process.
- Advanced Search Tool built into the left side of the screen with the ability to search on all available functionality topics within each section of the CRM.
- A Quick Sort tool to Sort search Results by a number of different topics including Name, Account #, Sales Rep, Territory, Category and Status.
- Move/Copy Tool for easy mobility of your contacts into different types of contacts within TradePoint Enterprise.
- Integrated Call Logs allowing for automated Reminders for follow up and the ability to attach Documents, Orders and Tasks related to any Call Log activity.
- Mass Mail Wizard built into CRM portion to allow for easy Mass Mailing tool based on search results of your CRM data. The Mass Mail Tool works for Microsoft Word 2003 and Word 2007.
- Mass Email Tool for easy communications with leads and Customers based on your Search results. The Mass Email tool is built into the Advanced Search Tool.
- One click mapping tool for contacts to access web based mapping tools for each contact or desktop based Microsoft Mappoint for easy generation of maps for onsite sales or service.
- Customizable Lead Details for tracking marketing efforts and Products of Interest per contact.
- Full Opportunity tracking per account reflecting the structure of your sales process.
- The ability to store Company Information such as size, revenue levels, SIC codes, number of offices, and year founded as a support tool for Marketing Efforts.
- The ability to track Customers purchase history including the ability to have detailed customizable fields per Product Owned and track service needs through Products owned.

- Customizable fields for each CRM contact type to accommodate detailed information specific to your CRM needs in the Your Data section.
- Open Notes section for each Contact type within the CRM.

#### **CRM: Contact Based Accounting**

- The ability to automatically store the purchase activity for each Customer.
- Generate Orders and Invoices from Customer and Reseller contacts.
- Generate RFQ's and Quotes from Sources, leads, Customers, Resellers, and Suppliers.
- Add multiple shipping addresses on the fly from a Quote, Order or Invoice.
- Support for assigning price lists per customer.
- Support for multiple form templates for frequently produced items including RFQs, Quotes, Orders, Invoices, Account Statements, Avery labels, #10 Envelopes and Contact Reports
- Store and manage Billing information including Payment Terms, Credit Card Information, recurring payment structures and tax exemption numbers per customer.
- Full Payables functionality for purchase Orders, Bills and Account Information including Vendor Taxation Numbers and Vendor Account Numbers eliminating the need for duplicate contacts..

#### **TRADEPOINT ENTERPRISE EMAIL**

- Open Email structure to support multiple Email Accounts within one Employee profile.
- POP3, IMAP and Exchange Server (for email only) supported to enable multiple email accounts.
- Auto-respond functionality responds from the account that sent the original email if you are using more than one email account within TradePoint Enterprise.
- Flyout Panel for easy viewing of Flagged Emails.
- Flexible Folder Structure for easy organization of your Email.
- Import your Email easily from Outlook with a Data Import Tool.
- Support for Vcards (electronic business cards) and graphic signatures for each email account you are using.
- Support for an unlimited number of Email Templates in HTML and/or text based templates that can be used on a per message basis or through the Mass Email Tool.

#### **EMAIL: INTEGRATED CONTACT MANAGEMENT**

- The ability to associate Emails with any Contact file, Project or Folder.
- One click functionality to create an Appointment from an email.
- One click functionality to create a Task directly from an email.
- One click functionality to create a Call Log directly from an email.
- Supports creating a contact from an email address.
- Save emails to your existing contacts in one click.
- Supports automatic copy to contact account for outgoing emails.
- Email rules to pre-sort incoming email to contacts, folders or projects.

#### **DYNAMIC SCHEDULE**

- Multiple views: Collaborative, Monthly, Daily accessible by one click.
- Your Schedule is directly related to your login.
- Create multiple Schedules within your Employee profile.
- Schedule time off and any holidays well in advance and allow them visible to everyone who has access to your Schedule.
- The ability to add internal Employees to your Appointments.
- The ability to add any of your contacts as guests to an Appointment as well.

- A tool to directly Invoice a contact for an Appointment that has already happened.
- Add Reminders to any Appointment created.
- Send email Invitations to any Contacts as Guests to an Appointment.
- Automatic notifications for any Employees that are added to any Appointments.
- Tools to Add Appointment minutes that will be available to everyone who has been associated with an Appointment.
- Tools to Add Personal notes to an Appointment you have created, viewable to yourself only.
- Change the Status of a given Appointment.
- Check the history of an Appointment to see who, when, and why it has been adjusted.
- Color coded Category structure.
- Appointment Category structure is consistent for the GANT charting within Projects.
- Establish multiple types of recurring appointments (Daily, weekly, bi-monthly, monthly, Quarterly, bi-Annual, Annually).
- Attach and/or create documents associated with a particular Appointment.
- Associate Budget items with a particular Appointment.
- Attach expenses to a given Appointment.

#### **WORK CENTER DASHBOARD**

- Role based views of your data for different people within your company.
- Drag and Drop tools for easy customization.
- Collapse-able menus and adjustable fields to view and organize your data the way you want.
- Graphic Views and line item views of Open Opportunities within your sales funnel.
- Live Updating of your activities throughout your day.
- The ability to perform numerous functions directly from the Work Center Dashboard.

#### **PROJECT MANAGEMENT**

- Tabbed Ribbon Styled Toolbars for easy access to functionality.
- Associate a Lead, Customer, Reseller or Supplier with a Project.
- Category and Sub Category Structure built within Projects for detailed organization of your Projects.
- Complete GANT charting capability for Tasks and Appointments.
- The ability to add Employees as well as any contacts as guests to an Appointment or Task within a Project.
- The ability to show each Task or Appointment as partially finished.
- Add Reminders to each of your Tasks and Appointments that will alert you as they come due from the Flyout Panel.
- Import existing Tasks or Appointments from your Schedule.
- Structure your Tasks and Appointments in a predecessor based structure (parent/child) multiple levels deep for complex Projects.
- Flexible GANT charting to rearrange Tasks and Appointments after they have been established.
- Add your billable working hours through the Time Clock or to the project directly for easy time management.
- Invoice your client for the billable hours worked on a Project.
- Generate a quote for the contact associated to a Project from a given Project.
- Add team members to your project and even assign them security settings for any use of one of our Ecommerce solutions.
- Track any Products Involved related to an open Project.
- Tools to create a budget for a project.
- Track expenses that are either related to a Budget or that stand alone in relation to a Project.

- Create, Scan and Manage Documents right down to security access for each of your Documents associated with any given Project.
- Store any email communication with a particular Project.
- Reply or Forward to an email that is associated with a Project.
- Email your Project Team directly from a Project.

#### **KNOWLEDGE BASE**

- HTML Editor built into the Knowledge Base for the ability to automatically generate the HTML code for your Knowledge Base articles you want displayed on your website through your Ecommerce Module.
- Editing tools built within the HTML editor for easy formatting of your content.
- Role Based Security Features enabling your articles to be viewable internally, externally through your website.
- SEO tools to add keywords and descriptions for each article that is created. This will add the keywords automatically to each of the web pages generated with the new article.
- Category structure that will create collapse-able Menus for easy to access Categorization of your articles.
- The ability to create links to related articles for easy cross reference on your website.
- Tools to create teaser pages for your articles.
- Create links to your Products within your Knowledge Base that will appear on the article page of your website for cross-selling/up-selling.

#### **DOCUMENT MANAGEMENT**

- Documents can be created, scanned or uploaded into TradePoint Enterprise numerous file types including a Contact, Project, Product, Task, Appointment, and Call Log.
- TradePoint Enterprise uses a 12:1 data compression ratio for all documents which consistently performs at a 10:1 ratio so you can generate and store hundreds of documents using a minimum of space.
- Create, link, and upload Office documents, PDF Files, Image files, AUTOCAD files and other file types such as CSV files and image files to your contacts, Projects, Products, Tasks, Appointments and Call Logs.
- Make revisions and show each revision that is time stamped with who made the revision and when.
- Create Documents with the version of Office that is on your computer through TradePoint Enterprises interface and associate that document with the contact or project you are working with.
- Scan in documents using the Scan icon and TradePoint Enterprise will look for any device attached to your computer to scan in a document in the file type available through your own scanner.
- One click functionality to create a revision based on an existing document.
- Change the security access or properties of a document after it has been created or uploaded.
- Web enabled security preferences to allow access through the web portal for each document generated or imported into TradePoint Enterprise.
- Email a document directly to someone from the document management window.

#### **SUPPLY SIDE MANAGEMENT**

- Manage multiple warehouse locations.
- Manage/Adjust Inventory levels.
- Integrated with CRM functionality.
- Track items in stock and items allocated for orders.
- Track and adjust Max/Min levels for Inventoried items.
- Advanced Reporting tools available for Inventory.
- Track warehouse location for each of your inventoried items.

- Perform Inventory adjustments, receive shipments into warehouse.
- Transfer Inventory between warehouse locations.
- Full CRM functionality available for Suppliers including contact based Receivable and Payable functionality.
- Advanced searching capability available for Supply Side Management.
- View shipment history per warehouse.
- Purchase Order functionality that accommodates Drop Shipped as well as direct shipping.
- Customizable Purchase Order forms that will populate with respective shipping preferences and addresses on the Purchase Order.

## **INVENTORY MANAGEMENT**

- Ribbon styled tabbed toolbars for easy navigation of Product listings.
- Create an unlimited number of categories and related sub-categories for your products.
- Inventory levels displayed during Order process for real time availability of your items.
- Integrated Accounting defaults for seamless tracking of Inventory transactions.
- Advanced searching capability within your Product information.
- Set defaults for different types of products including:
  1. Non-Inventoried items
  2. Drop shipped items
  3. Billable Hours/Services
  4. Inventoried Items with serial numbers
  5. Inventoried items with batch number
- Defaults to automatically add an Item to a Customer's purchase history immediately upon purchasing.
- Product availability defaults can be set determining the availability for promotional or seasonal items automatically.
- Establish multiple valuations if necessary for each of your Products.
- Costing tools for each Product based on valuations, Averages, or Per Purchase Order.
- MSRP (Manufacturer's Suggested Retail pricing) tools.
- Service feature available for each Product (if your Products have corresponding Service).
- The ability to associate multiple Suppliers with each product with preferences based on price or quality.
- The ability to share Products between multiple Divisions and websites with the Assigned Accounting Rules.
- Automatic reminders to reorder products based on Max/Min levels and preferred Suppliers.
- Detailed Inventory information available for each item.
- Support for quantity discounts.
- Create an unlimited number of Price Lists for your Products.
- Price List functionality includes the ability for an unlimited number of revisions to one Price List.
- Kit/Assembly including the ability to add batch numbers to Assembled items.
- Asset management functionality available for raw materials that are part of Assemblies or re-packaged to be sold in a different packaging structure.
- Manage product listings on your website through TradePoint Enterprise's interface.
- Support for Accessories and Accessories of your Products for up-selling and cross-selling on your website.
- Create and manage authorized Product reviews for your each of your Products and post them to your website.
- Create and add unlimited specifications for your products that can be posted as a part of your Product listings on your website.
- Full HTML editing tools to generate teaser and overview pages for your website's product listings.
- Create Custom pages for your products to display on your website.

- Create, attach and scan documents into each of your Product listings.
- Photo Gallery functionality for your products. Attach one or multiple images to your Products for internal or for use on your website.

## **HUMAN RESOURCE MANAGEMENT**

- Ribbon-styled tabbed toolbars for easy access to functionality
- Supports role based security settings that track all activity per Employee login.
- Track Attributes such as Education and skill level per Employee.
- Establish Email Settings for multiple-email accounts.
- Supports usage preferences for calendar, email, and push to Smartphones, Blackberries and iPhones per Employee.
- Payroll preferences for processing Payroll with the ability to customize your deductions per Employee.
- Manage Schedule preferences per Employee.
- Track the History of activity within Tasks and Appointments within each Employee profile.
- Track any items you provide to your staff per Employee (cell phone, laptop, vehicle, etc.).
- Attach Notes to an Employee file.
- Scan, create, and upload documents to each Employee file.
- Support for managing contracted or temporary Employees.
- Support for Employee reviews.
- Support for Expense Reporting.

## **MY BUSINESS ANALYTIC REPORTING**

- Over 200 preset report templates available within 8 different categories of Reports.
- Reporting Categories include: Accounting, Collaboration(Appointments, Tasks and Email), Contacts, Contact Personnel, Sales Activity, Employees, Product Information, Projects
- Role based security allowing only necessary access to specific reports based on role.
- Advanced filters available for reporting on specific data.
- The ability to save search filters to repeat reports with specific criteria easily.
- Export your reports in the following file types:
  1. PDF
  2. Excel
  3. HTML
  4. Plain Text
  5. CSV
  6. RTF
- Complete customizability of your reports with logos, Images, borders, watermarks, tables, graphics, bar codes, rich text, check boxes as some of the elements that can be added to your reports.
- Mail Merge, Mass Email and Move/Copy function available for use with the search results of the My Business reporting for easy contact management.

## **ACCOUNTING**

- General Ledger templates available to pre-populate a General Ledger structure into TradePoint Enterprise.
- Payroll Functionality to compute and print out your own payroll.
- Ability to create a customized or industry specific General Ledger structure.
- General Ledger supports up to 7 levels deep within an account structure.



- Contact based Accounting functionality for receivables and Payables.
- Track adjustments and refunds per contact or transaction directly through the General Ledger.
- Default Accounts for automatic posting of transactions.
- Print checks through TradePoint Enterprise.
- Pay multiple Bills at once.
- Time and date stamps activity within the G/L.
- Fiscal year based Accounting.
- Track departmental expenses easily.
- Detailed account information
- Drill down into transactions.
- Drag and drop fields for easier viewing of data.
- Easily produce a full range of Financial reports.
- The ability to print out a statement of Account activity.
- Individual or group posting.
- Easy transaction reversal.
- Support for forensic accounting through advanced searching tools.
- Create Bills and Invoices that are not contact specific.
- Manage Deposits easily.
- Easy Accounts Reconciliation.