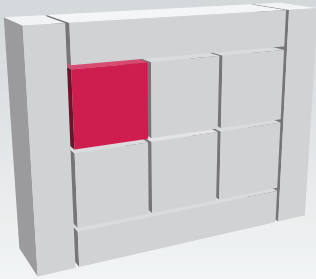


Claromentis™ Sales Manager



Claromentis™ Sales Manager



Advanced opportunity management

Easily customizable to fit with the sales team structure and lead-cycle stages of your organization, Claromentis™ Sales Manager supports sales teams in their day-to-day sales contact tasks and provides comprehensive reporting to enable effective management of sales teams. Fully integrated with other business applications within the Claromentis Framework, it is accessible through the Claromentis Portal environment.

Tailored to your business needs

Customizable settings fit with your existing sales structure - so the software works the way you do.

Selective access

Using the permissions structure within the Claromentis Framework, administrators can configure the application to give users access only to specific records that fall within the territory or project they have been allocated. This feature is particularly useful in channel sales situations where businesses must often give partners access to allocated prospect information without them being able to access details about prospects allocated to other partners.

Definable information fields

Definable metadata ensures that information captured for each contact and company can be easily customized to support specific sales processes.

Configurable lead-cycle stages

Each sales prospect record is flagged as having reached a particular stage in the sales process. These key lead-cycle stages can be defined as required to fit specific sales cycles.

When the prospect record passes from one stage to another, the application can be set up to trigger pre-definable events. These include screen changes to show what information should be captured next by the salesperson, as well as complex workflows to achieve key sales tasks such as sending a brochure or setting up a meeting.

Using the permissions structure within the Claromentis Framework, administrators can also ensure that only authorized users are able to reach certain points in the lead cycle - such as approval to tender, for example.

Multiple-currency handling

Claromentis Sales Manager can be set up to capture and report on multiple currencies.

Sales activity support

With intuitive interfaces, and integrated workflow and collaboration tools, salespeople can work productively - with all the information they need at their fingertips.

Access to sales documentation and resources

Integration with the Claromentis Document Manager application enables administrators to set up resource folders containing different documents, depending on the stage in the lead cycle that a prospect has reached. From quotation templates to sales collateral, users can access the documents they need quickly, as and when they need them. Users can also access full product listings using the catalogue feature, helping them to record opportunity details quickly and without errors.

Automated workflows

Claromentis Sales Manager integrates with sophisticated collaboration and information capture tools within the Claromentis framework to provide workflow automation, ensuring process compliance and improving productivity. Embedded e-forms, interactive calendars, web mail, message alerts and reminders can all be combined into workflows to support the sales process when required.

Easy search, filter and sort functionality

Powerful search functionality helps users to find contact and company information quickly. In addition, easy-to-use filter and sort tools help users to manage information to enable productive working.

Sales team management

A wide range of reporting options helps managers to keep up-to-date with the progress of their sales teams:

- Forecasting - Numerical and graphical reports by territory and project team
- Lost and won analysis - Reports are based on information entered into customizable fields at the completion of the lead cycle.
- Lead-cycle duration reports - Providing an analysis of the duration of key lead-cycle stages, highlighting problem areas.
- Custom reporting - User-friendly reporting tools enable managers to run their own reports, based on their individual access permissions.





Claromentis Sales Manager at a glance

Customizable settings

- Selective access
- Definable information fields
- Configurable lead-cycle stages
- Multiple-currency handling

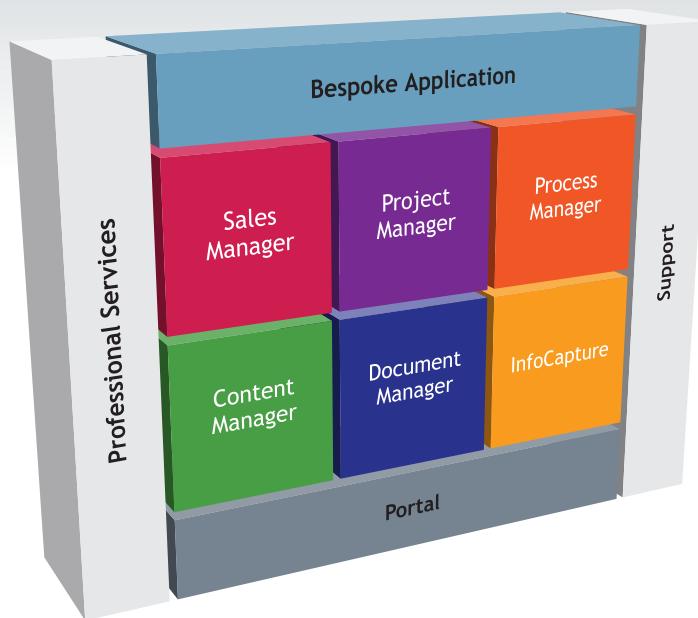
Sales activity support

- Access to sales documentation and resources
- Automated workflows
- Easy search, filter and sort functionality

Sales team management

- Forecasting reports
- Lost and won analysis
- Lead-cycle duration reports
- Custom reporting

The Claromentis Framework



The Claromentis Framework is a modular solution that offers information management, collaboration and process automation tools, as well as a range of fully integrated business applications - all within a single, web-based portal environment.

The Claromentis Framework incorporates the following products and services:

- **Claromentis Process Manager solutions**
- **Claromentis business applications and tools:**
 - Claromentis Document Manager application
 - Claromentis Enterprise Content Manager application
 - Claromentis Sales Manager application
 - Claromentis Project Manager application
 - Claromentis InfoCapture tool
- **Claromentis Portal environment**

About Claromentis

At Claromentis, we are passionate about creating practical solutions that deliver real business value to our customers. With a world-class development team and experienced consultants, we combine cutting-edge software with a wealth of commercial as well as technical expertise.

Since 1998, we have worked with a diverse range of organizations across multiple industry sectors, staying at the cutting-edge of the industry through continued investment in research and development, and an emphasis on continuous improvement. Our mission is to provide solutions that fit your business, rather than expecting your business processes to fit our solutions.

Contact us

For further information on any Claromentis products and services, please call us on +44 (0)1825 712888, email us at info@claromentis.com, or visit www.claromentis.com

IT works. The way you do.