

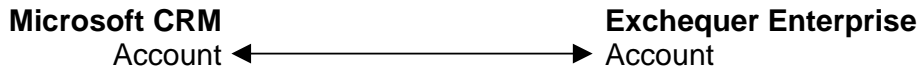
NEW - Master Link for Microsoft CRM

The Number ONE WEB based CRM Package

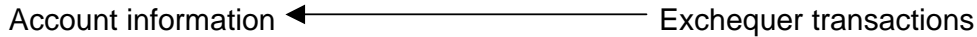
Following the successful Master Link for Goldmine and Act, ComTek are proud to announce **Master Link for Microsoft CRM**. This version of Master Link will utilise all the latest **Microsoft .NET** technology to enable seamless integration between Microsoft CRM and Exchequer Enterprise.

Microsoft CRM is a **complete web-based .NET CRM** package. This allows a user anywhere in the world to create accounts and take orders remotely, either via a Web interface or using the Microsoft outlook client, plus **superb integration using handheld devices**. We believe this will become the number one CRM of choice within a couple of years due to Microsoft's vast resources.

The Master Link server will synchronise data between Exchequer Enterprise and the Microsoft CRM in **real-time**. The following shows the level of integration:



All of the Exchequer account fields would be able to be mapped to and from the Microsoft CRM account fields.



From the account record and Microsoft CRM, the user will be able to see Exchequer, transactional information, such as outstanding invoices and orders, turnover, products last bought dates, job costing information etc.

Account: A B Applications Limited - Microsoft Internet Explorer

Account: A B Applications Limited

Information

General Details Administration

Account Name: A B Applications Limited Main Phone: 0117 655 8799

Account Number: ABAP01 Other Phone: 07953 457821

Parent Account: [] Fax: 0117 655 8899

Primary Contact: [] Web Site: []

Relationship Type: Customer E-mail: lthomas@abapplications.co.uk

Address

Address Name: []

Street 1: Russell Industrial Estate

Street 2: Russell Road

Street 3: Bristol

City: Avon

State/Province: []

Status: Active

Done

Account Information in CRM, changes to mapped fields, update Exchequer Enterprise automatically.

Exchequer Information View: Summary Print

A B Applications Limited
Russell Industrial Estate
Russell Road
Bristol
Avon
BS1 5NH

Del 1: A B Applications Limited Age 30: 0.00
Del 2: Russell Industrial Estate Age 60: 0.00
Del 3: Russell Road Age 90: 0.00
Del 4: Bristol, Avon Age 120+: 22,069.66
Del 5: BS1 5NH

Contact: Mr Thomas
Phone: 0117 655 8799
Phone 2: 07953 457821
Fax: 0117 655 8899
Area: 2
Type: TC
User 1: P Backs
User 4: A4070153892 (3QL8) A B

Balance: 22,069.66
Credit Limit: 22,069.66

Orders: 3,159.87
Oldest: 30/00/1899
Out Standing Debs: 22,069.66

Last Invoiced: 07/00/2000

Sales Y1: 146,010.88
Sales Y2: 32,042.76
Sales Y3: 211,654.26
Sales Y4: 0.00

Exchequer Account Live Information displayed in CRM.

Exchequer Invoices, Orders and Outstanding Transactions. Plus Turnover figures, Stock last bought and Job costing Information

Exchequer Information View: Outstanding Items Print Back

Our Ref	Del Date	Stock code	Net	Desc	Qty	Delivered
View SOR000850	31 Dec 2000	ALARMSYS-DOM-1	4,270.48	Domestic Alarm System, Model 1	10.00	0.00
View SOR000854	01 Jul 2004	CONTPANEL-8ZONE	462.00	8 Zone control Panel	2.00	0.00
View SOR000854	01 Jul 2004					
View SOR000853	01 Jul 2004					

Transaction SOR000854 Notes Print Back

Russell Industrial Estate
Russell Road
Bristol
Avon

A/C: ABAP01 Per/Yr: 7/2004

Date: 01 Jul 2004 Your Ref: []

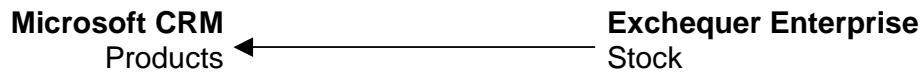
Del: 01 Jul 2004 Alt Ref: []

£ Net: 462.56 VAT: 0.00 Gross: 462.56

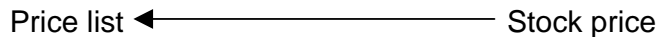
StockCode	Qty	Description	Net	VAT	Gross	OP
View CAB-SIGNAL-8CORE	1.00	6 Core Signal Cable	0.56	0.00	0.56	62.5
View CONTPANEL-8ZONE	2.00	8 Zone control Panel	462.00	0.00	462.00	23.33

Exchequer Transaction Information

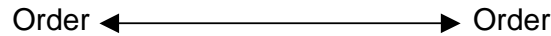
Remote Web based access to account information



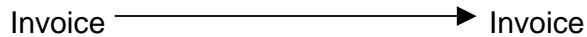
Master Link will transfer all stock information to the Microsoft CRM, and periodically update the current stock levels.



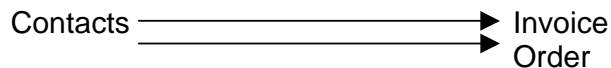
Master Link will maintain the product price, in the Microsoft CRM, with the information held in price bands A-H in Exchequer enterprise. A more complex price matrix can be set up within the Microsoft CRM based on the Exchequer prices.



When an order has been finalised within the Microsoft CRM. The user will simply flag the order as ready to be processed. Master Link will then import the order into sales order processing within Exchequer Enterprise. As each part of the order is processed in Exchequer Enterprise the delivered quantity will be updated within the Microsoft CRM, enabling the CRM user to easily see the status of each order.



The Microsoft CRM user can simply enter an invoice on the system, and when ready flag it to be transferred to Exchequer Enterprise. The invoice can then be processed in the normal way through Exchequer Enterprise.



The Microsoft CRM allows users to place orders or invoices against contacts. These contacts could be used to allow orders or invoices to be taken against customers who are the general public.

Custom Fields FOR FLEXIBLE Business Rules

The Microsoft CRM allows an administrator to easily add extra fields to CRM objects, such as accounts, products, orders and contacts. Master Link will allow any of these bespoke fields to be mapped to the appropriate records within Exchequer Enterprise. In addition to be able to create extra bespoke fields the Microsoft CRM allows you to create pick lists (selection lists). Master Link will offer a comprehensive range of field mapping options to allow selection values to be mapped to values in Exchequer enterprise.

For example:

In the Microsoft CRM, we may have one field, which will be a list box:

Terms, which could be: "0 days, 10% settlement", "90 days, 7% settlement".

In this scenario, we could set Master Link up to enable us to simply select one setting, but update many values in Exchequer. Thus selecting "30 days 10% settlement" would fill in 30 days in the payment days in Exchequer Enterprise and 10% settlement discount.

Master Link Reporting, via the WEB

Master Link will maintain the entire Exchequer transactional, job costing summary information in a Microsoft SQL database. This will allow the creation of bespoke reports within the Microsoft CRM to be accessed via the Web interface or using the outlook client.

360° of CRM Integration, View CRM information within Exchequer Enterprise.

The Master Link plug-in will allow Exchequer Enterprise users to easily view and go to information within the Microsoft CRM, to say schedule a call, at a click of a button.

Contracts and Support Desk

The second phase of the Master Link integration will include an interface to the Microsoft CRM service and support module. This will enable support contracts to be set up within the CRM and invoiced through Exchequer Enterprise periodically.

