

## **PowerRelate™ Channel Manager** **Solutions for the High Tech/Light Manufacturing Industry**

PowerRelate Extended Relationship Builder provides one place to profile and track your interactions with key clients, partners, businesses and the labyrinth of decision makers, influencers, consultants, boards of directors and other relationships that effect your revenue.

You can finally see all extended business and personal relationships to save you time and get to decision makers quickly. Also, Powertrak automatically links multi-level Activity relationships and provides threaded discussions to easily show the entire call progression for all sales, marketing and service Activity.

Accessible from your web browser and Microsoft Outlook, this module provides everyone in your organization with one place where they instantly can see important facts about the accounts, individuals, channel partners, even households they are working with.

Powertrak also provides multi-dimensional Activity roll-up across accounts/people/partners with fully definable Activity processes and Activity list views. Threaded discussions provide the complete call picture across all calls from the initial lead to final customer service call. Relationship trees show what revenue they provide (and influence), and show you how strong your relationship is.

Finally, everything is in one place to improve every interaction with your key customers.

### **Product Summary**

#### **See the Real Relationship**

Instantly view the strength and trend for every business and extended relationship with every customer, partner and revenue source.

#### **Account, Contact, Activity and Opportunity Profiles**

With unlimited facts (including one-to-many lists) you can keep everything regarding customer, activity and opportunity facts in one place.

#### **Automatic Activity Relationships**

Account/Contact/Partner associations link to all activities in real-time and save you review time.

#### **Key Customers need Special Care**

Instant visual ranking helps you make sure that every important customer is treated with extra care.

#### **Threaded Discussions**

From the original lead - to qualification - to opportunity - to sale, you can follow the path even in partner-driven deals.

#### **Built on Microsoft Dynamics CRM**

Expand on top of the safe, powerful Microsoft system.

#### **Dynamic Activity Lists**

All activities per account/contact, all activities per partner, all calls per opportunity and more in modifiable views.

### **Product Details**

#### **Instant Visual Scorecard**

- Does everyone in your organization know who is on the phone?
- Powertrak provides the first simple visual cue to show customer ranking and point out which way that account relationship is headed.
- Make sure that major client relationships are handled with care!

## **Product Details**

### **Unlimited Contact, Account, Activity and Opportunity Profiles**

- Approach your customers with the right message, using demographics, income levels, investment patterns and other facts that you develop or acquire from third parties to bring them into your community.

### **See Your Key Many-to-Many Relationships**

- Presented like branches of a tree, Powertrak shows you where to go to find customers and advocates that have influence, what family and business relationships they extend into and the level of advocacy they feel for your organization.

### **Streamline Your Processes**

- Build best processes in the Activity process builder, lower your costs and improve customer service through the use of process and activity tags.
- For all activities and calls, you can track key indicators of sales effort, marketing effectiveness and customer service trends in one place.

### **Built on Microsoft Dynamics CRM**

- Microsoft CRM provides a safe path for scalability, integration, and business value based on Microsoft .NET and Web Services architecture.
- Powertrak is built in the same tools and shares the same data.

### **Use Microsoft Outlook**

- Save time and money using Email, appointments, schedules, meetings and call history review right inside the Microsoft office tools that you already know.
- PowerRelate also works inside Microsoft Outlook to keep you informed everywhere.

### **Threaded Discussions**

- Review the entire call cycle and call notes across multiple contacts and employees, even partners' calls from one screen.
- PowerRelate automatically ties calls together across deals, service issues and sales processes to save you time, especially as your call history grows.

### **See Filtered Activities**

- PowerRelate Activity Lists show you exactly what you want to see by process, date range and activity type.
- Rather than opening and closing many screens, you can perform quick account reviews in one screen.
- Powertrak lists are modifiable through the optional Powertrak Application Builder, so you can get the most important information front and center.

### **A Complete Customer Relationship Management (CRM) Solution**

- Add Powertrak modules for specific industries, or add the general modules to improve every customer-facing department, even for multi-channel distribution and householding situations.
- Powertrak, Microsoft CRM and ERP solutions like Microsoft Great Plains Financials can help you round out a complete one-stop solution.