



## Internet Interaction Manager

Run your entire organization from the Internet

### Customer Relationship Management (CRM)

PortalProdigy allows you to easily access and update all of your organization's customers and prospects from anywhere at any time. PortalProdigy provides everything you need to maintain detailed information about each customer and prospect including their addresses, phone numbers, biographical information, notes, appointments, professional information, company information, special interests and more. PortalProdigy allows you to quickly access a customer's or prospect's transaction history, order status, shipment tracking status, and payment information directly from their customer and prospect record while providing everything you need to schedule appointments, tasks, sales calls, follow-up and other activities related to customers and prospects. Manage your prospecting and sales activities. Easily import prospect lists and existing customer and prospect data. Customer or new prospect records are automatically created when new users register on your Website. Send automated email broadcasts to selected customer and prospects. Print a variety of reports.

#### Customer Relationship Management features and benefits include:

- Centralized customer and prospect database.
- Unlimited number of customer and prospect records.
- Import customer and prospects. Import utility provides easy method to import prospect lists and existing customer and prospect databases.
- Export customers and prospects data. Export utility provides easy method of exchanging data with other applications.
- Store customers' and prospects' home, office, billing, and shipping information including addresses and phone numbers.
- User definable customer and prospect types. You can assign customers and prospects to multiple customer and prospect types.
- User definable special interest categories. Customers and prospects may select multiple special interests when registering online.
- Customize registration forms collecting as little or as much information as required.
- Create different registration forms for different purposes or products.
- Link customers and prospects to Company records.
- View lists of contacts for each Company.
- Collect biographical information.
- Collect credit information. Offer online credit applications.
- Assign credit terms.
- Create login and password entry into Website features and functions.
- Control features and functions that each customer and prospect has access to.
- Assign special pricing to customer and prospects.
- Assign tax exempt reseller status.



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- Display a calendar of your appointments and activities with customer and prospects. Calendar can be viewed by Month, Week, and Day.
- Track website activity by customers and prospects.
- Track prospect response.
- Track prospect source.
- Track and view customers' transaction histories.
- Track and view customer order status including shipment status and tracking numbers.
- Track and view customer and prospect service requests.
- Print detailed customer and prospect reports.
- Search and sort customers and prospects on all data fields.