

# Caspian<sup>®</sup> solutions



*CUSTOMER MANAGEMENT*

*MARKETING CAMPAIGNS*

*e-DIARIES*

*e-WORK FLOW*

*e-BUSINESS LEADS*

*PROJECTS*

*SMART AGENTS*

*ACCOUNT MANAGEMENT*

*INVOICES*

*ISSUE MANAGEMENT*

*SALES FORECASTING*

*MULTI CURRENCY*

*DOCUMENT MANAGEMENT*

Software solutions for the life of your organisation. 



## About Advanced Solutions International

Advanced Solutions International (ASI) is a world leading software developer of *iMIS* and Caspian for Web and CRM solutions with over 2600 customers. ASI Provides its solutions through direct sales and implementation teams and a global network of 60 accredited Solution Providers backed by award winning customer and technical support. ASI helps people achieve great things through innovative solutions.

# Caspian<sup>®</sup> solutions

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**Web Sites & eCRM**



**Account & Contact Management**



**Integration**



**Marketing**



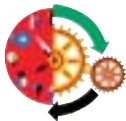
**Leads & Projects**



**Quotes**



**Sales Orders & Invoices**



**Customer Services**



**Field Remote Database Systems**



**System Administration & Tools**

## Web Sites & eCRM



Provide your staff around the globe immediate access to your central Caspian Database through any web browser, without the need to install any software on the user's PC. Enable your staff to access customer and prospect information needed at anytime and from anywhere. Provide authorised users with a 360° degree view of any Customer and Prospect information. Caspian eBusiness enables complete B2B order processing.

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## Account & Contact Management



Effective Account management is separate and additional to Contact management all of which is made simple and efficient with Caspian. Maintaining strong relationships with customers and prospects is critical to your success and growth. Use Caspian tools to acquire and leverage business intelligence through targeted communications.

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## Integration



Sometimes you simply cannot change existing systems and information must be provided to sales and customer services staff. Most integration requirements start simple and end-up complex and also require continual changes to its operation. Caspian provides you with the most comprehensive and detailed integration options.

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## Marketing



With Caspian Marketing you will significantly increase your marketing effectiveness and make better use of your budget. Provide better quality leads and monitor their progress through the sales cycle. Quantify how much business is forecasted and has been secured based on different campaigns and events.

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## Leads & Projects



Enable qualification and timely management of leads to create higher conversation rates. But if your sales process is complex, time consuming and progressively more costly, Caspian Project/Opportunity management will ensure that a methodical and comprehensive approach is adopted.

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## Quotes



It's hard to imagine any detailed requirements that cannot be addressed. Quotes and/or proposals need to be produced quickly and presented professionally. There could be complex rules for product selections, discounting and internal approvals. Produce forecasting and conversation ratios and analysis.

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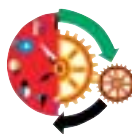
## Sales Orders & Invoices



Caspian provides you with easier, faster to use and equally as comprehensive sales order processing and invoicing as many accounting systems. The standard architecture of Caspian maintains and manages financial records at transaction level.

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## Customer Services



It takes years to gain creditability from your customers and very few mistakes to lose it. The increase in customer expectations and the need to increase productivity is essential in your business. Efficient tracking of issues including those associated with serialised products is fully satisfied with customisable options in Caspian.

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## Field Remote Database Systems



Sales staff working from their home often need as much if not more comprehensive and up to date information than those working from the office. With Caspian they also get robust and trouble free bi-directional synchronising of information.

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## System Administration & Tools



The Caspian extensive tools are designed with their intended users in mind, for example general system administration does not require IT skills. But there are also advanced tools for the IT department to provide you with effective and responsive support services.

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**Keep Caspian® Forever — you'll never outgrow its power**



With **Caspian's** e-marketing options & automations, accounts & contacts profiling, diaries & work flow management, leads & sales project methodologies, sophisticated quotes sales-order processing & invoicing, e-business & web integrations, legacy & accounting integrations and range of development tools - you'll never outgrow its power. **Caspian** is customisable packaged software with operating costs that are predictable and controllable from initial implementation through long-term use. Every year, **Caspian** is enhanced with self-installing upgrades sent directly to you. You'll also be supported with risk free and highly structured implementation services and supported with our proven 'Pinnacle' implementation methodology.



# e-Customer & Prospect Management

Access all of your Account and Contact records in your central Caspian Database. Create any number of Categories e.g. a Category for your top 200 Customers, a Category for your hot Leads and a Category of your Suspects where data has been imported from attending exhibitions.

### Accounts & Contacts

- Maintain an unlimited number of Contacts per each Account inclusive of common or unique addresses per each Contact
- Post Office address validation as well as warnings in case of duplicates

### Customer Updates through your Web Sites

- Provide unique passwords to each Contact of your Customer Account and enable them to update their own information via the Web Site
- All changes and updates are automatically reflected in your central database

### eMails & Letters

- Maintain a central collection of standard letters
- Produce Personalised letters using Microsoft Word and keep a record of your correspondence
- Integrate with automatic bi-directional processing of emails and appointments with Outlook and Lotus Notes
- Send your emails directly from within Caspian and have Caspian automatically read your incoming emails and attachments into your central database, building a complete picture against each Contact

### Logbook Listings

- Get a complete history of 'any type of communication' against the Account and its individual Contacts including invoices
- Check against the progress of any type of action, see if it has been followed up by staff in your organisation
- Find and access through linking or embedding any type of document, directory or URL to any record for fast retrievals

### Fast Find

- Quickly locate any Account and Contact record(s) through many different combinations of data fields
- Enter partial information into single or multiple fields for fast finding of information
- Build, Save and Re-Use your own personalised search lists

### Profiling

- Create your own user defined fields for any type of information against the Account records and separately against the Contact records



eCRM listing example

# e-Diaries & e-Workflow

Caspian eCRM will provide Personalised Diary management as well as Group Diary management. There are personalised and system wide security features for viewing Diaries.

### Diary Views

- Get a complete view of diaries by day, week and month
- Immediately find free days and slots within days
- Personal To Do list items
- Automatically updated Work Schedule listing of all actions due today and those from previous days which have yet to be completed
- Transfer of outstanding actions to your colleagues with built in audit trails



Personal and Group Diary management example

## e-Enquiries & e-Literature

e-Enquiries & e-Literature ensures that your enquiries are never lost; whether they are received via your web sites, email or by phone. Caspian provides automatic or manual capture of all information and ensures effective, timely follow ups. Keep records of all literature and PDF's sent out by staff or those automatically sent out by Caspian.

### Web Site Enquiries

- Integrate your existing Web Site(s) enquiries or requests for information with automatic processing into your central Caspian database
- Automatic update in personalised Work Schedule to make sure each enquiry or actions is followed up

### e-Literature

- An unlimited number of items can be selected per each enquiry or requested from your customers or prospects
- Send out personalised email responses with PDF or other files automatically attached
- Send out personalised letters; Caspian will automatically print an inventory pick list of literature that is to be included with the letter so you know which letter has to have which literature
- Keep a record of all literature or samples sent out to each Contact

## e-Leads Management

Each organisation and divisions within larger organisations typically wants to capture Lead information uniquely and analyse it based on specific requirements. Caspian eCRM provides an infinite amount of flexibility for producing tailored solutions as part of its standard functionality.

### Business Rules

- Define custom business rules to satisfy your information requirements and ensure the quality of the information captured as well as best practice needed by your staff
- Setup automatic changes to existing data in Lead fields based on the on-going updates of information

### Leads Layout

- Create single or multiple forms and layouts inclusive of shortcuts for accessing various pages
- Customise the look and feel of the Lead forms

### Lead Fields

- Specify any type of field and data type inclusive of single or multiple pick list options
- Apply calculations and validation rules to the data fields

### Leads Listing

- Automatic listing of all Leads against any Account inclusive of Last Date of Contact
- Manage any number of Leads against an existing Customer or Prospect



Single or multiple lead forms

### e-Report Designer

Caspian eCRM provides a flexible report generation and design facilities. In addition you can easily use third party reporting tools such as Microsoft Access, Crystal Reports and Business Objects.

#### Report Creation

- Create a template report and then modify for specific requirements saving time and restrict access to creation and modification of reports
- Database relationship wizards assists in creating complex reports and making it easier with instant deployment

#### Selection Criteria

- Utilise any of the fields, inclusive of user defined fields, and create simple or complex queries using operators such as AND, OR, () and many more
- Determine your own sorting order

#### Report Production

- Print to screen option
- Export in a variety of formats e.g. Excel, XML for specific requirements



Customisable report designer

### e-Business

Both Caspian eCRM and Caspian Client/Server software versions can be used with eBusiness modules to enable your customers to make purchases from you directly online from your existing web sites. For B2B businesses you will be able to provide your customers with credit facilities as you would normally.

#### Customised Web Pages

- You can design and maintain your own designs and branding on the web pages that display the Caspian information

#### Products & Services

- You can choose which of your products or services can be purchased from your Web Site
- You can provide additional information and automated substitutions for each product to assist your customers

#### Order Validation

- Each order from the customer can be validated using any number of business or commercial rules before it is accepted
- The customer can be presented with specific messages when completing the order forms

#### Re-Ordering & Order History

- Make it easy for your customers to re-order by using previous orders to generate a new one
- Enable your customers to look-up their past order history

#### Promotions & Notifications

- Provoke your customers to choose alternative products to those typically chosen and minimise your inventory
- Provide highly targeted promotional messages based on customer profiles and their historical activities
- Send out automatic emails informing your customer of the progress of their order. Where there are multiple orders Caspian will automatically combine the order statuses into one email message and keep the historical record

### Caspian Business Objects

Caspian Business Objects are functional COM and .Net components that provide secured application programming interface (API) to Caspian data and business rules. These can also be used for bespoke external programs written in a variety of programming languages whilst still applying Caspian database rules for maximum integrity.

## Account Management

Caspian provides powerful Account management solutions in addition to contact management.

### Account Details

- Manage addresses, invoice address, departmental and divisional addresses and an unlimited number of additional addresses
- Automatic duplicate warnings and prevention to improve data quality
- Use Dun and Bradstreet codes, as well as Caspian's own, company parent and subsidiaries structures
- Look up key name, unlimited alias and trading names used for searching as well as mailing name used on all correspondence and mailings
- Apply one or more database Categories, discounts and user defined fields for each customer record
- Assign Account Handlers with specific roles and responsibilities
- Quickly list and search for Accounts
- All change history details and audit trails are automatically saved



Accounts listing example

### Profiling

- Profile by using sectors & sub sectors, SIC codes, user defined coding, territory management with maps
- Capture through Customisable user defined fields including dates, numbers, single & multiple lookups and text fields
- Manage relationships between your customer and the relationships they have with other organisations and people
- Automatically or manually grade your Customers based on certain rules, conditions and update of latest information

## Contact Management

Managing relationships is made simple, efficient and comprehensive with Caspian contact management facilities.

### Contact Details

- Manage an unlimited number of Contacts per each Account
- Maintain extensive address details including Home Address and unlimited additional addresses
- Allow email mailing preferences including plain text, HTML and MHTML as well as multiple email addresses per each Contact
- Adhere to the requirements of the data protection act
- Correctly address Contacts with academic titles and suffixes
- Assign a single Contact to multiple Accounts and track activities
- Manage relationships to Contacts in other Accounts and the nature of the relationship



Contact listing example

### Profiling

- Who in your organisation knows the Contact (who knows who)
- Know the Contacts influence and motive within the Account as well as Contacts Job history and description
- Allows unlimited user defined tagging
- Customisable user defined fields including single and multiple lookups, text fields, dates and number fields
- International Contact mailing names and familiar name with automatic detection and use subject to signatory

### Logbooks

- Each Caspian Logbook consists of a range of data, which makes up a complete and informative record of any communication transaction. An unlimited number of Logbooks can be recorded against Accounts and Contacts
- Where a Logbook is for an activity such as a meeting, it will also automatically update diaries and work schedules
- A Logbook created for carrying out a task can be assigned to one or many staff members with the same or different next action dates and time for follow-up
- Follow-up status is automatically displayed per each assigned task against all assigned staff members
- Each Logbook can have 16 pages of unique notes inclusive of spell checking options

# Account & Contact Management

## Enquiry Processing

Processing of enquires with Caspian is fast and enables a comprehensive range of information capture. Enquires will never be lost or forgotten, nor will it take hours each day to process. You will also be able to target your marketing more effectively.

### Enquiry Details

- Enables full Account and Contact address details inclusive of Post Office address validation
- Allows manual or automatic assigning of Categories and Account Handlers
- Select from up to date marketing activities and link to the enquiry
- Insert manual or allow automatic next action date for follow-ups

### Response Letters

- Generate automatic personalised response letters which can be published by post, fax or email
- Produce literature and/or sample packing lists
- Automatically update history against each Contact with optional automated follow-up actions
- Supply mailing data lists to external agencies

## Diaries

Caspian Diary management enables collaborative management of activities for managing customers and prospects. Outlook and Lotus Notes diaries can also be bi-directionally integrated with Caspian's own diary management system.

### Diary Details

- View personal and Group listing per day, week and month
- Shows available dates and times
- Conflict warnings are automatically displayed to avoid double bookings
- Reschedule diary appointments
- Arrange meetings where multiple people from your company are attending

### Recurring Activities

- Enables title, description, date, time and updating of Work Schedule
- Select one of more personnel or departmental selection
- Choice of selection for day, week, month and number of years

## Work Flow Management & Automations

There is a never-ending demand on increasing the productivity for each staff and manager. This is made more complex with staff and managers being presented with constant conflict of priorities, so what is needed is a powerful workflow management tool in order to meet the productivity goals and to stay in control.

### Automatic Scheduling

- Perpetually maintained lists of all outstanding customer, prospect and internal meetings, activities and tasks
- Enables rescheduling of one or more actions
- Forward alarming and automatic prompts for new items added to the Work Schedule
- Subject to access rights, view colleague's Work Schedules and transfer tasks between staff members, inclusive of full audit trail
- Personalise Work Schedule Trays and colour coding

### Consolidated Information & Access

- Easy and fast view of full Account and Contact details as well as adding new information and updating information
- Assign follow-ups to multiple staff and view the current completion status or rescheduled details
- Access to all historical information with extensive filtering options and textual searching facility
- Production of personalised letters by fax, post and emails including emails which have embedded graphics and hyperlinks, use from a range of tailored templates including email templates



Work Schedule example

## Mailings

Caspian will enable you to produce highly targeted mailing lists simply and quickly with thousands of different combinations and an unlimited user defined range for searching. Send your mailings out through the post by fax or as emails.

### Centralised Database of Letters

- It takes a lot of time to produce well-written letters however, when written you'll always be able to use them by recording them in the central Caspian database of Letters then provide selective access to different staff
- Standard letters can also be changed for one-off use without affecting the original letter
- Letters can be signed by other names and job titles and have multiple signatories

### Extensive Mailing Selection Options

- There are so many different ranges, conditions and combinations available for producing your ideal lists for mailings. For example by categories of customers and/or prospects, user defined fields, types of activities, profiles, geographical attributes, financial details, products quoted, products invoiced, previous responses and web site visits
- Create your own totally bespoke searches and mix it with Caspian's own options, save, amend and re-use later
- Save result lists of searches and reload lists later for repeat use but with latest addresses and preferences

### Mailing Production

- Produce personalised fax letters, postal letters as well as emails which can be automatically set to recipients personal preferences for plain or rich text with embedded graphics and/or hyperlinks to Web sites
- Supply your mailing list files to external agencies for production and dispatch

## Outlook & Lotus Notes Automatic Bi-directional integrations

You can choose which emails, contact records and appointments are automatically read into your Caspian database and by doing so you can provide information to all authorised users saving time and always being up to date.

### Contacts & Appointments Records

- Enables bi-directional synchronisations of your database with the Caspian database
- Enables bi-directional reading, creation and publishing of appointments with your Caspian diary and work schedule

### Emails & Attachments

- Send emails as well as any attachments directly within Caspian without the need to user your Outlook or Notes system and Caspian will automatically update the 'sent items' box
- When receiving emails from your customers and prospects inclusive of attachments, have your Caspian automatically update the central and/or your field base database and enhance your 360° view
- You'll have automatic update of activities from the incoming emails into your personal work schedule for follow-ups



MHTML email example from 'within' Caspian

## Document Management & Sharing

There are so many different types of documents created everyday. With Caspian document management you can ensure that everyone knows about them.

### Automatic Prompts

- Users can automatically be prompted to know about the existence or availability of any type of document
- Automatic prompts can also include any number of network Directories on any hardware server

### Linking & Embedding Documents

- Allows optional embedding of documents into your central Caspian Oracle and MS SQL Server databases
- Provides a fast method of linking documents and directory paths to any record, e.g. organisation, meetings, leads
- To authorise access to documents Caspian will automatically recognise a users normal network access rights and then enable the user to simply double click for immediate access to view or amend

# Account & Contact Management

## Knowledge Management

Caspian's built in knowledge management system provides an unlimited amount of information about internal processes and procedures as well as many different types of information that can be made available to everyone in your organisation.

### Structure

- Create any number of subject books with their own directories which expand to show full details
- Create any number of topics with large rich text fields
- Attach any number of documents with name and description for simple and fast access

### Presentation & Search

- When writing or pasting information use different fonts, sizes and colours
- Carry out searches to locate the information you are looking for
- The 'what's new section' shows you a list of what has been added

## Security

Aside from typical security features there are many sophisticated security options available, which enable different divisions, departments or even users to control access to the information managed within the central Caspian database.

### System Manager Controlled

- The Caspian system manager can set up many different combinations of access rights, for example prohibiting the sales staff from division X getting access to meeting details carried out by another division Y managing the same shared customer or negotiating with the same prospect
- Optional electronic signature to provide encrypted security

### User Defined Security

- One or more users can be provided with the ability to set security
- Users can decide who else can access selective records for example meetings and projects

## Single Click Graphical Analysis

The simplest operation of any software is when users only have to do just 'one single click' to be presented with lists of live data to work with, or view graphical multi-dimensional information to make more informed and faster decisions. Caspian's customisable Single Click system provides unmatched sophistication and simplicity.

### Customisable & User Defined

- You can create any number and types of single click listings or multi-dimensional graphical analysis
- Each single click can be presented to the users with your own organisation's internal language/description
- Single clicks can be deployed uniquely per each user so that for example, sales and customer services have their specific single clicks.
- Build and instantly deploy any single click using your own internal business language and descriptions

### Graphical Analysis

- Caspian single clicks can automatically and seamlessly pass data to Excel and Word, and present you with a pre formatted graphical presentation, you wouldn't even have to launch Excel because everything is automatically done by Caspian



*Totally automated Caspian Single Click listing example*

## Dashboards

Dashboards provide up to date summarised performance information and is personalised for each manager and staff. The built-in personalised and customisable dashboards are ideal for automatic presentation of vital performance measurements, KPI details and statistics information such as amounts of monies due, number of leads YTD & MTD, sales forecasts, quotes YTD & MTD and more.

## Examples of Optional Functionality

Please contact ASI for information about many more optional modules, the following is a small selection.

### Formalised Account handover and approval

You can assign and re-assign one or more sales staff per each Account and ensure that this process goes through a formal review and approval, which requires sanctioning within Caspian with an electronic signature. Existing and pending actions will automatically be transferred to the new Account Handler(s) for follow-ups.

### Consolidating multiple Sales Ledger customer accounts

Where you have Project based Accounting inevitably there will be many customer Accounts and unique Codes on your Sales Ledger for a single customer. When these sales ledger accounts are integrated with Caspian the sales and customer service staff will only be presented with 'one single' consolidated customer record in Caspian against which all of the sales ledger Accounts details and Codes are displayed.

### Advanced Integrations with Microsoft Exchange, Outlook & Lotus Notes

There is a range of additional options for creating very specific and seamlessly integrated automations with MS Exchange and Lotus Notes. For example, Caspian could get updated with emails sent or received to and from staff who are not Caspian users and yet their communications needs to be integrated into the central Caspian database in order to get a 360 degree of the customer.

### Timesheets

There are many types of service types that require the execution of many tasks all of which are time based and would require capture of actual time spent for analysis and/or invoicing. Caspian Logbooks also incorporates a time duration facility that captures the actual time spent per each type and task for the delivery of the service - by staff. The total hours and minutes spent are automatically presented against previous estimates or budgets.



Timesheet summary example

### Mobility with ActiveSync for PDAs, XDAs and Phones

Caspian ActiveSync carries out customisable and automatic bi-directional newly 'inserted' data and 'updates' existing data held in the Caspian database and the Outlook/Lotus databases used on the mobile devices. Work schedule current and outstanding actions, Logbooks such as meetings and Leads can be updated and are automatically categorised in the Outlook database. Caspian will automatically avoid duplication of data in your Outlook database.

### SMS Messages

With Caspian you can send specific messages individually or on mass to a user defined range of customers or prospects. Also there are automated messages or alerts based on specific conditions or events, for example when a customer's web access password has been used to place an order with you, or to notify customers about a forthcoming seminar and their need to register with you.



Exchange information with your XDA and mobile phone

### Word Forms

Design your own data capture forms in Word and have its data dynamically update the central or field remote Caspian databases.

# Optional Functionality

## Geographical displays

Map point software will seamlessly and automatically receive its information from your Caspian database and provide many geographical displays. For example when planning a day for sales meetings and you are trying to figure out the most efficient route for making appointments. Or if you are organising a marketing road show and you want to see how many customers there are within certain geographical area or location.



*Plan trips*

## eMail Broadcasts

When you are doing email mailings with tens or hundreds of thousand of contacts it may be more efficient to provide your mailing data to a specialist email broadcasting agency. You can also automate the supply and receipt of response details. Alternatively you may email broadcast smaller quantities or in smaller batches yourself using your internal network and server facilities in which case, Caspian has sophisticated functionality for dealing with numerous issues such as email bounce backs and out of office messages as well as options for recipients to 'opt-in' or 'opt-out'.

## Courses & Events Bookings

Set up educational courses, seminars or events which require managing single or multiple streams with various subsidiary sessions. Define attributes such as status, tutors, rooms, equipment, and prerequisites such as qualifications. Organise activities for example; managing dates, promotions, mailings, maximum and minimum attendees, availability, bookings and table seating. Issue pro-forma and professionally presented and branded sales invoices in multiple currencies and record payment amounts and methods inclusive of early bird bookings.

## Subscriptions

Managed subscriptions can be done at organisational or individual contact level. Unlimited number of subscriptions can be set-up. Some of the basic attributes about a subscription can include product, subscription number, date and value. Set-up your own customised attributes including look-up fields. Extensive lists selection and search options are available. For example, build a mailing list for those contacts who's subscription is due to expire within 30 days, or promote subscriptions to other contacts within the same customer account who have not yet bought a particular subscription.

## Multi Currency

Don't get caught out with the fluctuations of exchanges rates and end up reducing your gross margin or profits. The multi currency module can be used with Logbook products, enquires, leads forecasting, opportunity/project sales forecasting, quotes, sales orders and invoices and can integrate with your accounting system. Each 'line' in a quote or invoice is typically known as a transaction and has its own unique exchange rate and changes recorded. Each quote, sales order and invoice record also gets used in all the financial analysis using its uniquely recorded exchange rate making sure that your analysis of the numbers is not inaccurate. When editing older transactions you can choose if the older exchange rate should be used or not. Strict and controlled access is provided to authorised users for setting and changing the exchange rates which can be done at any frequency or automatically. With each change to the rate there will be automatic audit and change history inclusive of the user name, date, time and previous rate, meeting the needs of your financial auditors.



*Multi currency master table per transactions*

Please contact ASI for information about many more optional modules.

## Integration

Integration is a critical and in many implementations a mandatory requirement if the customer relationship management requirements and business goals as well as productivity plans are to be successful. Caspian makes integration practical and simple to execute as well as allowing for changing situations and requirements including future software upgrades. Caspian provides an industrial strength range of standard, customisable options and tools for integration with virtually any legacy system including green screen systems as well as Accounting, ERP and MRP systems, e-Business and Web Sites. Integration processes can be automated and custom built to present 'view only' or changeable information within Caspian.

## Legacy Systems

### From 'green screens' to AS400 and mainframes

- Caspian integrates data with very old bespoke systems such as Cobol and with hierarchical database architectures and structure where complex additional rules will also be needed to successfully integrate
- Consolidation of disparate data from multiple database sources creating more complete/consolidated information in the central Caspian database

## Credit Control Integration

### Financial Information for all staff

- Improve cash collection and avoid time wasting with information showing accounts on stop and credit limits
- Staff can see actual amounts in local currency and the number of invoices due within set periods such as 30, 60 days etc. View of full invoice details against each customer record. Full invoice details automatically integrated from the accounting system or when using Caspian's own sales invoice processing module
- Automatic warning messages or prevention of production or approval of quotes, forecasts, sales orders and invoices based on credit status and credit limits

## Accounting Systems Integration

### Customers, Products & Transactions

- Through the central Caspian database, updates to each field based sales person's database is done in a 'very fast' and automated manner with automatic sales information or other messages to the remote/field base staff
- Within Caspian your Sales Ledger customer records are synchronised and yet Caspian maintains separate addresses for invoices, mailings, deliveries and many more
- Optional automatic 'consolidation' of multiple Sales Ledger Account Codes for 'one customer' from the Accounting/Financial/ERP/MRP system into 'one' single Caspian customer record so that the marketing, sales and customer services staff get one consolidated customer financial view, or project view
- There are more than one set of codes and numbering systems for customer records and products
- Unlimited products & services with each product having up to 1,000 fields for attributes as well as a list of associated suppliers, for example; stock codes, pictures, specifications, locations, units of measure, substitutions, web only
- Enables multi currency transactions inclusive of a unique exchange rate per transaction
- Provides financial periods to match your accounting financial periods
- Report, list, view, insert and/or edit rules and conditions as well as security options per each user or groups of users

## Bi-Directional Live Integration

### Fast & flexible

- Existing integration templates are available or you can at any time custom build to integrate summarised data and/or individual financial transactions into the central database and through it to unlimited field based databases
- Use the tools to integrate your customers, products, quotes, sales orders and invoices; field trimmings, validations, tables, headers, scripts, mapping grids, copy fields, field conditions controls, indexes, selectively update fields, header conditions, header multiple mapping, header saving options and automated log files and email alerts
- Without compromising your future with Caspian software upgrades, develop custom solutions with Caspian business COM and .Net objects and API

## Marketing

Manage any emailing, event, exhibition or marketing campaign. Marketing requirements are varied for example; Christmas card lists, automated Web site enquiry processing, producing lists, personalised emailing with email address validations and the ability to manage all the email bounce backs and automated messages.

### Campaign Management

- Plan and manage the logistics and ensure prerequisite sequences of tasks for virtually any campaign
- Ensure everyone knows about the current campaigns, assign internal actions and check status of completion
- Provide document management, for example; graphic designs, spreadsheet files
- Sort out the literature and samples to be used and sent out inclusive of multi location inventory, PDF files

### Mailings

- Email address or postal address preferences can be used to make sure you reach the targeted person
- Emailing using MHTML with your own templates and designs, also checks email addresses and those who do not pass will automatically get selected and transferred to your printer for postal mailing
- Mail merge with WP or fax and through SMS phone messages
- Update each Contact' history inclusive of full contents of the personalised letters for future reference

### Follow-ups

- Check staff diaries then assign follow-up actions to any number of staff and include specific instructions or scripts
- Reassign a selective or range of follow-ups on an ad-hoc basis

## Analysis

The never ending challenges of knowing more about each customer's buying patterns, email preferences and the last time they visited the Web site or made on-line purchases, are a few examples that marketing professionals need to address almost everyday.

### Automate Responses

- Based on specific criteria you can automate responses and personalise your response based on enquiry type
- Each response would have its own set of information for example; letter content type, Web site links and attachments
- Full details of responses are automatically saved in the historical activity records contributing to the 360 degree view
- You can also assign automated follow up actions to one or more staff members with automated escalations in case actions are not carried out as it was planned or expected

### Responses, Budgets & Sales

- Manage costs; per lead, the entire campaign or each individual tactic such as advertisements and mailings
- Monitor budget vs. actual expenditures per each element of a campaign
- Carry out graphical comparative financial analysis between campaigns and reallocate remaining budgets
- Track and quantify sales forecast, quotes, sales orders and invoices based on the execution of marketing campaigns

## List Management

There are many occasions when various lists need to be produced and reviewed before and after marketing activities. Lists can be saved and reloaded at any time and access to lists can be controlled per staff member. Apply virtually any selection criteria to produce the required lists including your own custom SQL queries.

## Web Integrations

However your Web sites are structured and built you will be able to integrate enquiry details into Caspian using different methods. Check and de-dupe incoming name and address details, add or amend and update, and see the audit history. Update Contact's profile details and reuse the information for future marketing activities and account management.



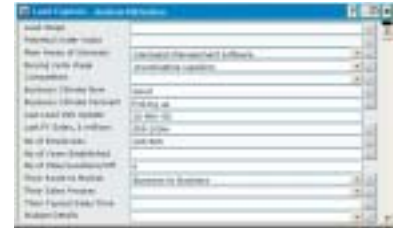
Customers plotted on map

## Leads

Virtually every business needs to be very attentive and efficient in managing leads. An enquiry eventually becomes a lead and it starts to accumulate more important information. Leads need to be managed and followed up with specific actions. Pick and chose the functionalities needed within the Leads module.

### Customisable Layouts

- Each lead can have its own fields of information, validations and rules to support best practice or key requirements
- Leads layout manager is simple to use and forms can be deployed immediately
- There are also many different field types to ensure accuracy and consistency of data capture, as well as making it simpler for your sales staff to use
- You can also provide access to different lead forms to the same or different members of sales staff and make changes easily and at any time
- You can make global changes to all or a selective range of lead forms
- Automatically update linked Account and Contact user defined fields to avoid errors, duplication and improve profiling information and feedback to marketing
- Provides conditional selections for your mailings using the fields used in the lead forms to improve your targeting



Lead form example

### Multiple Lead Forms

- Create any number of lead forms within minutes and make them available within seconds
- A lead can have any number of pages within it where each page focuses on specific requirements and actions
- Add or amend leads at any time and yet control who makes the changes
- Leads can be marked as current, completed, suppressed with private or shared access across the company
- Record additional and linked documents - any number or type
- Report on lead conversion rates and sales periods



Lead with products, sales notes and associated documents

### Literature & Samples

- Provide an accurate and up to date list of literature and/or samples available for sending
- Enable multiple selections of PDF documents and other electronic files, brochures and promotional items
- You can use or share the same list of items with the marketing department or other departments and Web sites

## Products, Services

Use codes or pick lists for selection of services/products or groups of products and at the same time enable viewing of full product information

### Forecasting

- Provide flexibility for who can/can't change default prices and discounts
- Each lead and/or each product used within the lead form has its own individual user defined sales status from a look-up list with likely order dates
- Produce sales forecasts based on products, date ranges, sales status and any other queries needed, and automatically view information in Excel using Caspian 'Single Clicks' module

## Resellers & Partners Lead Allocations

Ideal for single or multi-tiered sales channel or reseller networks for when you want to assign leads to them.

### Actions & Follow-ups

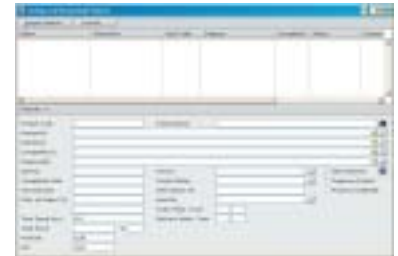
- You'll never forget to follow up each lead with a reseller and you can also follow the lead directly yourself
- List leads assigned to each reseller, follow-up in batches of leads and update the latest information in one go
- Enable your resellers to securely update the latest information about the leads 24/7 from your existing Web sites

## Projects

Sales Projects or major opportunities typically require more detailed and structured execution and information management. Leads can become opportunities/projects and it may be that there is a long sales cycle and many people within your own company as well as other organisations become involved. Everything centres on the Project and typically a substantial amount of information needs to be acquired, integrated together, consolidated and then managed over a long period of time. It may be important to also adopt structured methodologies to ensure that each opportunity or sales project is managed properly.

### Project Details

- Assign any number of Accounts and its subsidiaries from any number of Categories and assign any number of staff each with their own responsibilities per project
- Provides a range of rich text notes fields with detailed audit trails for example; sales strategies, red flags, specifications, general notes, business climate, PEST, etc
- Linked quotations, sales orders and invoices can be summarised or listed by transaction
- Enables user defined project listing, fast search options and duplicate warnings
- Links with marketing source, leads, all past and pending activities by anyone
- Provides automatic follow-ups in work schedules, alarms and internal transfers of actions with built-in audit trails



Project basic details example

## Sales Processes & Methodologies

Adopt sales processes assisting sales staff in their approach and assessment of sales opportunities to improve sales management.

### Customise

- Customise screens and rules to suit the different needs of sales teams within your organisation
- With one single click list projects that either 'have met' or as yet 'have not met' certain status, conditions or criteria
- Create your own unique fields with business validations rules and personalised pick list options

### SWOT Analysis

- Strengths, Weaknesses, Opportunities and Threats (SWOT) attributes for analysis and business intelligence can all be combined and very simply capture the latest status through you own unique parameters and score ratings
- The SWOT grid provides a very detailed picture of your likelihood of winning the sales project
- SWOT measures you against your competitors and learns from previous wins and losses for % and/scoring predications helping your sales staff to qualify out sooner rather later



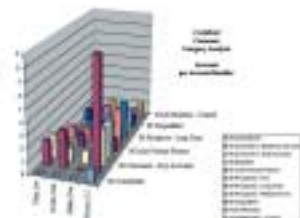
Winning predictions

## Forecasting

You can start sales forecasting from the very early stages of the sales project with high level numbers and then make it much more detailed and specific as you move down the sales process.

### Sales Pipeline & Detailed Sales Forecasting

- Forecast selectively per product with expected order date, discounting, probability and follow-ups
- Graphically analyse virtually all selections and conditions
- You can also produce sales forecasts in multiple currencies
- Create Sales forecast notes to make your sales meeting more meaningful and effective



Automated graphical analysis example

## Manufacturing Forecasting

Link up sales forecasting with manufacturing forecasting requirements and minimise inventory and conflicts. Produce per product, per manufacturing periods to meet the customer's delivery expectations. Integrate with MRP systems.

## Partners & Competitors

Add and remove competitors and their activities. Include your partners and resellers into the project management and activities.

## Quotes

Quotations can be produced by sales office staff and by on the road sales staff using up to date product information and prices. Bring about immediate efficiencies through faster, error free and professionally presented quotations. Irrespective of whether you have a few hundred or hundreds of thousands of products with complex details and attributes, Caspian will meet your requirements.

### Cross Sell & Up Sell

- Quotes are not only registered and analysed against each Account but also registered against each Contact ensuring that when it comes to marketing your company you know exactly who to go to
- There are a range of optional and automated quote production and follow-up business rules and conditions
- Set-up your own quote approval rules with electronic signatory requirements and built-in audit trails
- Carry out fast product searches with optional integration into Excel for built-in custom price calculators
- Quickly and simply change status, re-quote, add and remove products and maintain revision histories
- Link and track quotes to marketing campaigns, enquiries, leads, sales projects and then convert to orders and invoices
- Cross sell and up sell between different products and prompt users to make selections or automatically include products when issuing quotes, sales orders and invoices

### Quotes Listing Options

- Produce many lists based on user defined range of options and thereafter save for future use
- List quotes by virtually any attribute, for example; all quotes against one customer, date ranges, products, quote creator, signatory, internally approved by, category of prospects, Account handlers and many more

### Customisable Prints

- Produce automated customisable prints with seamless integration with Word
- Set-up Word templates for different departments or market sectors for printing
- Email the quotes directly from within Caspian without having to use your email system

## Products

Set-up and import an unlimited number of products and services in multiple groups.

### Customisable Attributes

- You can have up to 1000 attributes, for example; catalogue numbers, stock codes, colours, stock location, units of measure, third party suppliers and many more
- Present product hierarchical structure such as groups and action with global updates and changes

The screenshot shows a software interface with a table. The table has multiple columns, with the first column containing customer names and the second column containing percentage conversion analysis. The data is organized in a grid format, typical of a spreadsheet or database view.

Quotes % conversion analysis by customer

## Automated Pricing and Analysis

It's obviously very important that the agreed terms and conditions are reflected in quotations. With Caspian automations you can ensure that mistakes and errors are avoided.

### Automated Pricing & Discounting

- Manage and assign unique discounts per each customer and the quotes automatically get updated with your own pre determine rules for automatic calculations of discount bands based on quantities/volumes
- Provide price lists with unlimited price categories based on quantity ranges and price types
- Selectively allow staff access for discounting rates and ad-hoc discount changes or special offers

### Probability based Sales Forecasting

- Improve sales forecasting accuracy by applying percentage probabilities. Not every quote can be included in the sales forecast and not every quote can be won, so any percentage can be applied to the whole quote or even each line of the quote
- Avoid double counting in the sales forecasts because of the automated or manually reverse updating of previous forecasts by a different sales staff member against the sales projects

### Conversion Analysis

- Quickly list how many quotes for any period of time by staff members, date range, products, geographical areas and more
- Review what value and percentages are being won, identify the least quoted products and minimise inventory, see multiple quotes and conversations against the same customer
- Analyse quotes by different currencies and at the same time ensure accuracy by avoiding currency fluctuations

## Sales Orders

Provide detailed sales analysis information from within Caspian. If you are using legacy or modern accounting, ERP or MRP systems, Caspian can integrate your sales order transactions at any frequency intervals and make it more accessible and user friendly. The Sales Order processing module can also be used as a stand alone system in the office and by field based sales and customer services staff. Sales orders generated can be viewed by other Caspian users without having the sales order processing module software. The multi currency module can be used with the sales order processing module.

### Sales Order Processing

- Meet the requirements of accounting sales ledger systems using the Caspian sales order processing module with or without inventory management
- Use flexible business and operational rules and conditions with extensive product attributes
- Link and track orders to marketing campaigns, leads and sales projects
- Fast and simple conversion to sales invoices with multi currency
- Lists and search sales orders based on user defined options

### Conversions from Quotes

- Within a few seconds generate accurate and error-free sales orders
- Make amendments to products, quantities and prices based on the original quote details

### Customisable Prints

- Automated and seamless integration with Word using your own templates
- Multiple addresses, delivery notes and signature for order acceptance



*Sales order example*

## Invoices

Improve the effectiveness of your sales office staff and field based sales staff as well as your customer services staff by integrating your invoice details or invoice transactions from your existing legacy or modern accounting, ERP or MRP systems at any frequency interval. Alternatively use the Caspian invoice module and integrate its transactions with your financial systems. Other Caspian users including field remote users can view the issued invoices without having the invoice module software. The multi currency module can be used with the invoicing module.

### Invoice Processing

- Produce accurate and error-free sales invoices within a few seconds
- The sales invoice processing module meets the requirements of the accounting sales ledger system with or without inventory management
- Record customer's purchase order details, VAT/tax, unlimited addresses, additional notes and payment terms
- Produce overdue payment analysis inclusive of partial payments

### Conversions from Quotes & Sales Orders

- Within a few seconds generate accurate and error-free invoices from quotes and/or sales orders with customisable prints, automated and seamless integration with MS Word using your own templates
- Make amendments to products, quantities and prices against the original quote and/or sales order

### £/\$ Transaction Listing & Searching Options

- List invoices by many search and selection options
- Produce transactions analysis

### Mailings

- Use an extensive range of options or use your own queries to search and select prospects and customers with sales orders and invoice transactions for mailings, for example; customer contacts who bought product x in month z



*Invoice payment terms and example print*

## Customer Services

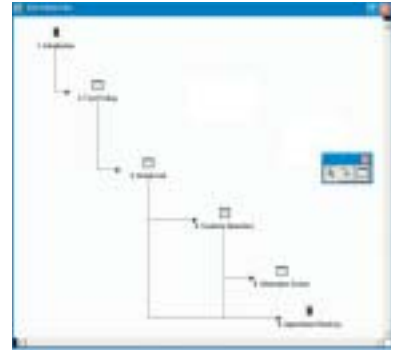
Enable the marketing, sales, operations and finance staff to know about the customer service, support and product issues and the current resolution status. You can integrate your specialist customer services or helpdesk system's information into the Caspian system. Alternatively use Caspian's customer services options.

### Roles & Responsibilities

- Customers can be assigned categories and each customer can be assigned one or more named staff members and the built-in change history keeps track of staff changes, making customer handovers easier
- Assign specific roles for each staff member for each customer or groups of customers
- Quickly access and manage documents, WP letter merge, bi-directional email integrations and Web site integrations
- Capture the time spent for service delivery or task completion and compare actual with budgets

### 24/7 Scheduling & Automatic Follow-ups

- Automatically assign actions to one or more customer service and sales staff members
- Manage work flow with alarms and listings for all outstanding actions as well as user defined automated escalations
- Transfer work loads of outstanding or pending issues



*Build your own processes*

## Issue Management

Create user defined fields and business rules for capturing specific information with associated notes.

### Customisable & Structured

- Set-up automated rules to enforce and support procedures and process based executions
- Computer Telephony Integration (CTI) options are available

## Serialised Products & Contracts

Manage an unlimited number of contract types per each customer with expiry date, notes days and hours for coverage. Track unlimited serialised products/equipment, warranty period, external supplier allocation, on site, days and hours for coverage together with additional notes. Tracking issues per product and/or support contract is made simple.

## Web & Mobility

Update your PDA/XDA and Phone with today's servicing tasks by field based engineers and then update the central database at any time during the day or at the end of each day with completed tasks. Integrate with your Web sites and provide 24/7 access to receive tasks and update completed tasks.

## Knowledge Management

Provide a wealth of information centrally managed with any number of topics with large rich text fields and search facilities. Attach and manage documents with name and description, and provide fast access with a single click to the actual document.

## Remote Field Based Database Systems

Broadband means there are more staff members working from home and it's not always practical to be connected with on-line access to information or to update it.

### Automatic Updates

- Provides very fast processing through the Web, wide area network, Client server, VPN, Citrix and Terminal server based systems
- Bi-directionally synchronises at any time and as often as required

### Unlimited Remote Databases

- Provides each remote database with its own set of prospects and customers data, all managed centrally with extensive security requirements
- Data manager options ensures complete control of data being updated into the central database
- Automatic updates for when there are territory changes, leads allocated, Web enquires, projects assigned, etc



*One of the remote database control options*



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