Agiliron - Sell More in More Places. Manage in One.

In today's competitive economic environment, it is imperative for businesses to continually think of ways to **increase top line revenue**...while **reducing operational costs** and administrative overhead.

Solid technology solutions are the cornerstone to achieving these objectives. End-to-end solutions that larger enterprises use to compete are not **affordable**, not available as an **integrated package** and require significant dollars for licenses and hardware.

The **AGILIRON Complete Multi-Channel Commerce Suite** is squarely aimed at solving this dilemma. The solution is targeted at and designed for a growing business **addressing the most common pain points** experienced during that stage:

- Inability to grow sales without the right technology infrastructure
- Piecemeal Solutions leading to a solution mishmash, silos of information
- Lack of business visibility across all business sales channels
- Manual processes with duplication of effort and consumption of valuable resources
- Cost of multiple solutions acquisition, business customization, deployment, training and ongoing maintenance

The **AGILIRON Solution Suite** delivers **seamless management of all business sales channels while integrating Back-Office (ERP) and Front-Office (CRM) functions to streamline operations**. The modules are primarily aimed at **meeting the needs of product-based businesses - Wholesale, Retail, E-Commerce, Distribution, Resellers and related businesses** are examples of types of business categories that can take full advantage of the broad set of capabilities and the unique value proposition that the AGILIRON solution brings to the marketplace.

Product Capabilities

Agiliron is **"The Complete Multi-Channel Commerce Suite"** targeted at E-Commerce, Online Marketplaces, Retail, Wholesale and related Product-based Businesses.

The Solution Suite integrates the following broad capabilities:

- **Management of Multiple Sales Channels**
  - Agiliron B2C & B2B Webstores
  - Adapters for Magento, Bigcommerce, Shopify Webstores
  - Remote Webstore (API Integration)
  - eBay Auctions & Stores
  - Amazon Marketplace
  - Retail POS
  - Direct Sales

- **Front Office CRM**
  - Customer Management
  - Sales Force Automation (SFA)
  - Sales Cycle Management
  - Order Management
  - Customer Support

"Before using Agiliron, Wagner Custom had separate software tools for ecommerce, production management, order fulfillment, inventory, and CRM. We had to manage several databases with overlapping information. Our processes were inefficient, prone to error, and limiting our ability to grow. We wanted to switch to an integrated business enterprise package that could aggregate our data, simplify our processes, and make reporting easier.

Being a small company, we found Netsuite to be cost prohibitive. Agiliron made sense for us because it enables us to integrate our CRM, inventory, ecommerce, production management, and order fulfillment into one system. Plus, it works with Quickbooks which we were already using."

- Pete Wagner, CEO, Wagner Skis

- **Back Office ERP**
  - Flexible Product Catalog, Merchandising, Pricing Management
  - Sophisticated Inventory Management across all sales channels
  - Order Fulfillment
  - Supply Chain Management
  - QuickBooks Integration (on Intuit App Center (http://appcenter.intuit.com/agiliron))

- **Business Intelligence**
  - 50 Standard Reports, Add Custom Reports
  - Customizable Dashboard

- **Team Management**
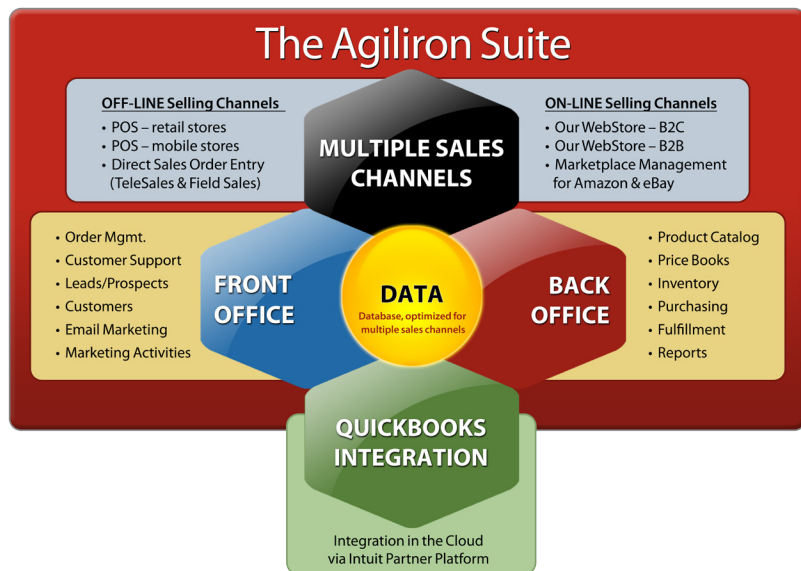 - Role Based Security
  - User Collaboration

Figure 1: Agiliron Integrated Business Solution Suite

> **"** *After installing a system that cost $30,000, I soon realized that it was not as easily customizable as the sales rep had led me to believe. It was cumbersome to use which made it difficult for my non-technical staff members to implement. Fortunately, I heard about Agiliron, was able to participate in their Beta program and I quickly become an early adopter.* **"**
>
> *- Judith Henderson-Townsend*
> *CEO, Mannequin Madness*

Product Benefits

- **Affordable Solution Suite** targeted and designed for growing businesses. The solution is delivered as a hosted Software As A Service model using a subscription based pricing model. Starting at Free, we offer a low entry point and ongoing operating costs to deploy enterprise class capabilities for your business with little or no investment in additional hardware or licensed software. Please see **Software As A Service** section below for details on the delivery model and the benefits that is delivers to you and your business.

- **Integrated One Stop Shop**...the only solution you will need for streamlining your sales activities and managing your business operations...does not require expensive piecemeal solutions and risky software integration projects. AGILIRON interoperates with popular applications (Intuit QuickBooks®, Microsoft Office®) and payment (Authorize.net®, PayPal®, Intuit Merchant Services etc.) vendors to facilitate the necessary business processes and allows you to retain and leverage your investments in these business solutions.

- **Grow your top line revenues** by adding new sales channels...the ability to experiment with new sales channels has never been easier...with a few clicks place your products in front of audiences in new marketplaces or add a new webstore targeted at a different demographic or other niche opportunities. The infrastructure to support these efforts is yours for the taking.

- **One integrated 360 view of the business**...regardless of the number of sales channels, stores or stock locations...Customers, Products, Suppliers, Orders all in one system...no more islands of data and cumbersome manual processes to make sense of the pockets of information. Ring in cost savings by improving your administration, operations and business processes.

- **Modular Building Blocks** - pay and use what you need (different product editions available to support your immediate needs)...as your needs change add additional modules, upgrade to a more sophisticated edition of the product or add additional employees as you bring them into the business.

- **Dedicated Database for your business data**...this combined with latest technologies in secure communications, storage and role based security built into the system ensure a highly secure computing, access and data transfer environment for your business information.

Software As A Service (SaaS) - Secure Access Anywhere, Anytime

- **Run your business from anywhere**...Connect to the Web - Sign in and Go! All you need is an internet connection...you could be at a remote business location, trade-show, on the road for business or on personal time...you can rest assured that you are only a few clicks away from access to realtime information regarding the current state of your business.

- **Scales with your Business, Add Users on the fly**. You can sign-up for the service with one or more users (mapping to their specific roles and functions within the business) that are currently operating the business. As your business grows and you add employees, you can add users to the system by providing individual accounts thru the administration capabilities within the tool. The customer only pays for what they need at any point in time while preserving complete flexibility to add, change or delete users as required adapting to the changing needs of the business.

- **Low start up & operating costs**. The service is delivered on a per user subscription model - What this means is a low entry point to begin using the system for their business without a large upfront acquisition cost for a license fee based software product. In addition, the hardware cost of deploying this system for a multi-user business is small compared to the traditional client-server model that would require acquisition of a server and a sophisticated intranet connecting all the systems along with the ongoing maintenance and administration of the IT infrastructure.

- **No data protection and backup worries**. AGILIRON takes care of running your channels and business operations on redundant failover systems with regular backups of your business data (see our Service Level Agreement for specific terms) so you no longer have to worry about hard disk crashes or computer failures. You are leveraging a world class IT infrastructure to run your business...**all our servers run on Amazon Web Services™ cloud computing infrastructure**.

- **No software patches or upgrades**. With a hosted solution, the software upgrades and patches are performed on our servers (you will be notified before major upgrades) and the next time you login you are automatically using the new version. There are no software installation hassles and headaches keeping up with the latest versions and associated data migration on your end...just login and use the system and let us handle the IT infrastructure. **You and all your employees are always using the latest version of the product!**

> "*We compared Agiliron to traditional ERP solutions and found the value/cost equation very compelling. Implementation and deployment is an on-going process. We have found the Agiliron team to be responsive and ready to invest the time necessary to assist us.*"
>
> *- Miguel Mendez, CEO, Klassic Gem Cuisine*

General Service Information & Capabilities

Product Editions

- **Free Edition**

- **Professional Edition**

- **Premier Edition**

- **Enterprise Edition**

- See http://www.agiliron.com/products/pricing.html for edition features and pricing.

Business URL and Database

- **Unique Database** for the business

- **Unique URL** for the business (https://yourcompany.agiliron.net)

- Administrative Account provided with every business instance, this Admin account can then add other User Accounts as necessary with appropriate access privileges

System Requirements

- Access Anytime, Anywhere

- PC running Windows XP/Windows Vista®/Windows 7 OR Apple Mac running Mac OS X 10.x® - 2.0 Ghz or higher CPU, 1GB or higher RAM, Display 1024x768 or higher

- Broadband Internet Connection (DSL, Cable etc.)

- Web Browser Software -Microsoft Internet Explorer 9.0 or higher, Mozilla Firefox 11.0 or higher and Apple Safari 5.0 or higher are supported

- QuickBooks® integration requires QuickBooks Pro 2013 or higher running on a Windows 7/8 PC

- Integration with online marketplaces (e.g. eBay, Amazon) requires a seller account with the marketplace and secure access from the AGILIRON Solution to your marketplace account (documented instructions provided)

- For Retail POS hardware requirements, please see the User Guide (http://www.agiliron.com/support/agiliron-solution-help/#User Guide/Retail POS/supported-pos-hardware.html).

Ease Of Use Features

- All Modules Organized as Independent Top-Level Tabs that can be turned on/off based on applicability to the business

- Top-Level Shortcuts for **"New Entity"** Creation

- Shortcuts for **"Last Viewed"** Items in Left Panel

- Quick Entity Creation Forms on Left Panel for each module

- HTML Online Help - Context Sensitive

- System-Wide **"Unified Search"**

- **"Full featured HTML Editor"** - available throughout system for content creation (e.g. emails, product description/categories, designs templates, activities, notes, HTML pages)

  - List of Capabilities (Source/HTML view, Page Preview, View Full Screen, Insert Image/Flash/ Links, Upload Files using Server File Browser, Editing controls and HTML Elements controls)

- **"Server File Browser"** - available throughout system for content upload or access (accessible

from HTML editor and otherwise) - File/Content Upload, Browse, Preview, Select

Common Capabilities for all Modules

- Field Based Entity Search

- Alphabet Based Entity Search

- List of Entities in Module with Paging Controls

- **User Defined Custom Views** - Select Field Columns Display, Date Based Filters w/ Chronological/ Reverse Chronological Sort, and Field Based Filters ; Make it the Default View for the Module; Select number of entities to display in list view; Include in Key Metrics on Home page as necessary

- **Entity Detailed View** - Each entity is correlated to Related Information in other modules (e.g. Customer Account displays all related orders, products, quotes) thru sub-tabs with paging to support large number of entries (e.g. notes/activities in reverse chronological order with excerpts displayed in list view).

- **Cloning Entities** - Easily create new entities from existing ones

- Entity Edit View - Edit individual entity field values

- **Bulk Edit** - Edit field value for multiple entities at once (available in select modules)

- Module Tools - Import, Export of data and other capabilities relevant to the specific module

- History - Logging of changes to entities (who/when) in all modules

User Configuration

- User Information & Password - Location, Role, Group, Email, Signature and various other preferences

- Email Server - IMAP interface can be setup to one/more email service providers to pull email into the Agiliron CRM

- Module Selection & Customization - Based on Roles and User Profile

Interfaces to External Tools

- **CSV Format Import/Export** – Products/Inventory Data, Pricebooks, Leads, Potentials, Accounts, Contacts, Orders and many others

- **Bulk Import of Product Images** - Import all products images at once into the system

- **QuickBooks Accounting Integration (using Intuit Partner Platform)** - Import and Export

- MS Office - CSV Exports

- PDF Exports of Reports, Receipts, Quotes, Invoices, Packing Slips

- IMAP for Receiving Email from your email service provider

Agiliron Customer Support

- Available through Forums, Email, Phone depending on the selected subscription edition

Self-Help Documentation and Guides

- Comprehensive User Guide - PDF and HTML

- HTML Online Help - Context Sensitive

- Quick Start Guide for Basic, Matrix Item, Serialized, Lots, Assembly products (provided with com-

plete sample data sets)

- QuickBooks Integration Guide (provided with Agiliron QuickBooks Company File Template)
- WebStore/Website API Developers Guide (for Remotely Hosted WebStores/Websites to connect to Agiliron Front and Back Office)

Service Level Agreement (SLA) & Security

- Hosted on Amazon Web Services Data Centers in multiple zones for redundancy & risk mitigation
- 99.5% Uptime SLA, Automatic Data Backups
- **PCI Level 1 Compliance** - Payment Card Industry Data Security Standard (PCI-DSS) Level 1 Service Provider Certification - the highest standard of excellence for payment data security
- Please see http://www.agiliron.com/policy/tos.html for Terms of Service and Security Policies

Business Setup and Customization

Company Information

- Name, Address, Phone, Fax, Email, Website, Logo

Warehouse (Stock) Inventory Locations

- Unlimited Number of Stock Locations (based on subscription edition)

Create and Manage Users

- Profiles, Roles, Users
- Administrator(s) can Reset Password for users (auto-generated password emailed to user)
- Customize Top-Level Tabs
- Setup IMAP interface to Email Server

Create and Manage Groups

- Add Users to Groups
- Group Users into Teams to facilitate Team based allocations of entities, tasks, activities

Module and Field Access

- Default Organization Sharing Access - Define Sharing privileges across organization
- Default Organization Field Access - Define Fields in various modules across organization
- Field Accessibility - Constrain Fields by each User Profile

Sales Channel Configuration and Customization

- Add/Delete Sales Channels (B2B WebStore(s), B2C WebStore(s), Remote WebStore(s), eBay Integration, Retail POS)
- Details by Channel Type - see list of features for each channel

Accounting Setup

> *"Agiliron was there every step of the way, effective in their communication of the deployment process and transitioning the business over to the new platform in a timely & orderly fashion."*
>
> *- Jen Ryan, Owner, Mooloolaba*

- QuickBooks Company File Template provided with QuickBooks Integration Guide
- QuickBooks Integration Configuration (using Intuit Partner Platform http://appcenter.intuit.com/agiliron) - import QuickBooks Company File Lists (Chart of Accounts, Item List, Payment Methods, Shipping Methods, Sales Tax Codes, Sales Tax Rates) from QuickBooks
- Business Bank Accounts Setup
- General Ledger Accounts Setup
- Inventory Adjustment Reasons Accounts Setup
- Tax Authorities Setup - Authority, Rate, Shipping Tax Rules
- Map Agiliron Payment, Shipping, Tax, Adjustment Methods to QuickBooks Methods

Module Customization

- Add Custom Fields to any modules
- Supported **Custom Field Types** - Text, Number, Percent, Currency, Date, Email, Phone, Single-Select/Multi-Select Pick List (Drop-down List), URL, Checkbox, Text Area
- Product Module - Apply custom fields selectively to products (i.e. turn them on/off for each product)
- Leads Module - Map Custom Fields to equivalent in Potentials/Accounts/Contacts to facilitate transfer of fields during conversion of Leads to Potentials/Accounts/Contacts

PickList Customization

- All drop-down fields list of choices for user selection available for customization - All modules

Communication and Notifications Setup

- **Define & Edit HTML Templates** - insert field markers (Contacts, Leads, Users, Company, Products) for automatic merging of fields during sending of emails or usage of design templates in channels like eBay
- Setup **Auto Order Notifications By Channel** - (a) Order Creation Confirmation, (b) Order Fulfillment Confirmation, (c) Order Modifications, and (d) Backorders
- **Customize Auto Order Notifications** - Content and Recipient List
- Inventory Related Notifications to Product Stock Manager
- **Security Token** - Generate/Regenerate Token to be used for Website API communication e.g. Add Leads to Agiliron CRM from Website contact form

Currency Configuration

- Single Currency - Configuration to any native currency, it applies uniformly across the application

Configure Shipping Carriers and Carrier-Specific Methods

- Shipping Taxable or Non-Taxable based on Shipping Method and Tax Jurisdiction Rules
- Map to QuickBooks Methods

Configure Payment Methods

- Mapping of Payment Methods to Deposit Bank Accounts and QuickBooks Methods

Configure Payment Processors

- Setup Payment Processors for Processing Credit Cards in CRM (Sales Order)

Configure Shipping Processors

- Setup Shipping Processors for Processing Sales Shipments to Customers

Product Related Configuration

- **Product Categories** - Add/Delete/Change, Define Hierarchy Tree, Category Display Order, Category-specific Image, Custom HTML Description, SEO Title/Description/Keywords
- **Manufacturer Configuration** - Add/Delete/Change, Manufacturer-specific Image, Custom Description, SEO Title/Description/Keywords
- **Matrix Item Configuration** - Unlimited User Defined Attributes (e.g. Size, Color, Styles), Unlimited Choices for each Attribute (e.g. Size - Black, White, Pink, Yellow...), Automatic Sorting of Product SKUs based on the Definition Sort Order
- **Product Specific Custom Fields** - Turn on/off custom fields for individual products

Sales Channels

Phone, Direct or Catalog Sales

- Can support unlimited number of sales agents
- Adding a new agent is as simple as a PC and an internet connection
- All account activities, orders, tasks associated with sales agent
- Reassign accounts, orders or tasks to other agents
- Manage Leads
- Track Potentials thru Sales Cycle & Activities
- Automatic Conversion to Customer Accounts
- Generate Quotes, Sales Orders, Invoices
- Automatic Conversion of Quotes to Orders to Invoices
- Customer Sales & Support History Available
- Enter Orders directly into Back-Office - see "Order Management" section for feature list
- **"Sales Rep"** Profile available for restricted access by external reps to information relevant to their customer accounts

B2C WebStore

- Add/Delete **B2C WebStore**
- Select a **Design Template**
  - 70 Total Number of Templates - **30 Free** Templates, **40 Premium** Templates ($100-$350)
- Specify the Store URL - route domain to AI servers using CNAME at domain registrar (detailed instructions available)

> *"Having two separate web stores, one for retail and one for wholesale, allows our wholesale customers to log in and place orders. This frees up time we used to spend taking orders to focus on marketing activities and growing our business."*
>
> *- Joanie Dhillon, Owner, Idawg Clothing*

- Specify PriceBook and Specials PriceBook
- Specify Starting Order Number for the Store orders

- **Unlimited Number of Products** (depends on edition)
- **Unlimited Bandwidth**
- Captcha's for Forms
- Short and Long Descriptions
- Customer Account Maintenance - Edit Account Preferences, Change Password, Track Order Status and History, Problem Reporting
- Specials - Sale Items Section - Strike Through Pricing
- Promotional Banners
- **Cross-Sell** - Automatic Generation of "Customers Who Bought Also Bought"

- **Shopping Cart**
  - Secure Checkout - SSL Security (does not require certificate purchase)
  - Purchase without Account option available
  - Order Confirmation and Fulfillment Notifications to Customer (optional)

- **Domain Routing** at your Domain Registrar
  - Custom URL(s)

- **Design Editing and Customization**
  - Select from over 70 Designs; Change to a different Design anytime at the click of a button (old design backed up automatically and accessible)
  - Easy Customization (optional services available)
    - Replacing Logo and Images
    - PSD of the design provided (depends on edition)
    - Editing the CSS
    - Editing Header and Footer (depends on edition) layout, design and elements
    - Server File Browser - Access to stylesheets, images and other collateral files organized in logical groupings; Multiple Files Upload capability for bulk modifications/update of design files, images etc.

- **Manage Discount Coupons**
  - Discount Coupons - %, $, Constrain by Date, Constrain Times of Use (per customer, total), Minimum Orders
  - Exclude/Include Product Specials from Discounts

- **Setting up Standard WebStore Pages**

- Conditions of Use, Shipping & Returns, Privacy Policy, Contact Us
- Custom HTML Editor

- **Setting up Custom WebStore Pages**
  - Page URL, Page Name, Page Titles, Custom HTML Editor
  - Up to 20 Custom Pages/Store

- **Set up Shipping Zones and Methods**
  - 15 geographic zones (e.g. US, Canada, Rest of World), 5 shipping methods/zone (e.g. Standard, Priority, Expedited)
  - Pre-defined WorldWide Zones available for easy selection
  - Handling Fees
  - Tare Weight
  - Table Rate
    - Tables based on Price, Count or Weight
    - Specify Method Name, Table and Mapping to Shipping Method in Back-office
  - USPS
    - Shipping cost automatically calculated based on volume and weight information associated with products in order

- **Set up Payment Methods**
  - Authorize.net - Authorize/Capture - Enter Login ID and Transaction Key
  - PayPal Website Pro - Enter Username, Password, Signature
  - PayPal - Enter Email Address
  - Offline Credit Card
  - Check/Money Order
  - Cash on Delivery
  - Secure - HTTPS processing

- **Set up Tax Zones and Rates**
  - Based on Nexus
  - Designate Specific Tax Authorities for each Zone, Rates automatically assessed based on the Tax Authority Rate settings

- **Set up Store Options**
  - Select **Favicon**

  - **Specify Email Address** to receive customer emails, order emails, from address for outgoing emails

- Specify **New Customer Welcome Email** in HTML Editor

- Customize **Home Page** - Display Custom HTML, New Products or Featured Products
    - Featured Items - Highlight specific products, Specify Display Order (selected products auto updates to store - add/remove)

- **Display Elements** - Browse By, Manufacturer, Brand, Search, Categories, Order History, Best Sellers, Specials, Shopping Cart, Promotions, Information, Tell A Friend, Whats New, Reviews, Product Notification, Manufacturer Info - Not all available in all templates though (depends on columns and template design)
- **Product Search** by various attributes - Basic (keyword) and Advanced
- **Display Products** as List, Grid - Specify number of products/row, Max products per page
- **Display/Select Matrix Selection** (e.g. Color, Size) as Single List or Split List, With/Without Differential Pricing
- Customer Product Reviews

- Specify **Image Display Sizes**
- **Unlimited Images** Per Product, Enable/Disable Click to enlarge for Main Image or Alternate Images
- **Picture Zoom** for Product Images

- Customize all the **Labels** in the store

- Customize the **Display of Product Categories** - Number of Levels, Appearance, Display Empty/Product Count

- **Browse By** - Provide Browse By Selected Custom Product Attributes, Manage the Display Order

- **Inventory** - Check Out of Stock, Allow/Disallow Checkout, Customize Messages

- **Google Analytics** - Visit Tracking, E-Commerce Tracking of Conversions to Source, Capture search keywords
- **Google Base** - Automatic feed of all store products to Google Product Search every 24 hours

- **Selectively Deploy Products to the WebStore** - Setup Auto Product, Category, Inventory Updates to Store from BE
    - Select Products, Pricing, Quantity

- Assign Products as **Specials** to the WebStore

- Recorded User Accounts and Orders from WebStore automatically captured to Agiliron CRM in real-time

- **Search Engine Marketing**

- Specify Title, Description, Keywords Meta-Tags for all Pages (Standard, Custom, Categories, Products, Manufacturers)
- Automatic Submission to Google Base

B2B WebStore

- Add/Delete **B2B WebStore**
  - **All features of the B2C Store** with incremental capabilities listed below
  - Special Pricing based on assigned Price Book
- **Store Access require Login**
  - Restricted Access - Password Protection, Require Login
    - Passphrase for Account Creation - assign secret code
    - Passphrase Message to prompt user to action to obtain passphrase
    - Tax ID, Reseller ID (required/optional) field for Account Creation
  - Accounts Management for B2B Customers from Front-Office (designate which contacts are B2B customers and should have access to B2B Store)
    - Email Store Access to B2B Customers - custom URL (Sample Email Template available)
- **Minimums**
  - Minimum Order Amount - By Order
  - Minimum Quantity/Product - By Product (any combinations of SKUs)
  - Minimum Total Order Quantity - By Order
- Payment Methods - All as in B2C Store, can be customized to Terms for B2B Sales
- Shipping Methods - All as in B2C Store, can be customized to offer Deferred Shipping
- **Display Inventory** Information (Qty in Stock, Qty on PO/Due Date)
- **Bulk Add to Cart Table** (for quick specification of quantities for multiple skus to add to cart)
- **Customer Specific Pricing**
- **Display Pricing** Table Information (Retail, Wholesale, Customer)

Remote WebStore

- Add/Delete **Remote WebStore** not Hosted on Agiliron
  - Map Shipping, Payment & Taxes from Remote Store methods to Agiliron methods for auto capture of orders with the right settings
- Integrate w/ Agiliron Front-Office and Back-Office thru a **REST Based WebStore Integration API**
- WebStore API Developers Guide (for Remote Stores)
- Two-Way Communication between WebStore and Agiliron System
- Product Catalog, Pricing and Inventory Information from Agiliron to WebStore
- Specials and Discount Coupons from Agiliron to WebStore
- Order, Customer and Transaction Information from WebStore to Agiliron in real-time - Also edit Accounts, Orders (Cancel, Update, Query)
- Order, Product, Customer, Fulfillment Update Information propagated from Agiliron to WebStore

Adapters for Magento, Bigcommerce, Shopify WebStores

"Agiliron integrates with Quickbooks, keeps customer & vendor lists, sales histories, multiple pricing scenarios and much more. And I'm optimistic about Agiliron's plans for increasing number of e-commerce channels."

- Mike Farrace, Owner, Optikrock

• **Integrates these shopping carts as a Sales Channel** in Agiliron allowing use of Agiliron capabilities with existing e-commerce stores.

• Establish **Connection between Agiliron and WebStore** with API Key Credentials

• **Two-Way Data Flow Integration** that encompasses the following business workflows

• Products, Pricing, Inventory information push from Agiliron to Webstore - manual, automatic

• Customers/Orders capture from Webstore to Agiliron

• Map Shipping, Payment & Taxes from Webstore methods to Agiliron methods for auto capture of orders with the right settings

• Order Fulfillment information from Agiliron to Webstore

• Adapter Software Module available for Customization

eBay Integration (Listings, Stores) - US Only

• eBay certified as an **"eBay Compatible Application"**. Add/Delete an **eBay Sales Channel (Auctions, Fixed Price and eBay Store)**

• **eBay Integration** Capabilities include

  • Listing Products/Items on eBay (number allowed based on edition)

  • Options - Highlights, Gallery and many others

  • Free picture hosting on Agiliron

  • Option to Lock Inventory of listings

• **Map eBay Categories** for Agiliron Categories - Automatically Sync to eBay Store

• **Verify** Listing Parameters & Confirm eBay Fees before Listing an Item

• **Listing** an Item

  • Listing Types - Chinese Auction, Fixed Price

  • Category Selection Wizard

  • Listing Duration Selection

  • Product and Pricing (Start Pricing, Reserve Pricing, Buy It Now Pricing, Fixed Pricing)

  • Shipping and Payment and Fulfillment Settings

  • Tax Settings

  • List Matrix Item Products (eBay Multi variate listing)

  • Complete details of Listing, Listing Fees and Link to eBay Listing Available for every listing

• Apply **Design Templates** for Listing Description

  • Setup once in HTML editor, field markers merged with product data (regular fields, custom fields, images)

• **Revise** an eBay Listing

• **Clone** an eBay Listing

- **Relist** a completed eBay Listing

- **Questions for Seller**
  - Automatically captured as Ticket under Front-Office (CRM) "HelpDesk" Module
  - Respond easily from Agiliron, Responses from Agiliron automatically interfaced to eBay

- Recorded Orders from eBay automatically captured to Agiliron CRM in real-time

- **Customer Order Shipping & Tracking Information** propagated back to eBay from Agiliron

- **Buyer Feedback** captured for each Listing

- **Real-time Dashboard** to view all listing, bids and current status

Amazon Marketplace - US only

- Amazon ID and Agiliron setup for **Connection to Amazon Seller Account**
- **Two-Way Data Flow Integration** that encompasses the following business workflows
- Products (ASIN Lookup available), Pricing, Inventory information push from Agiliron to Amazon - manual, automatic
- Customers/Orders capture from Amazon Marketplace to Agiliron
- Map Shipping, Payment & Taxes from Amazon methods to Agiliron methods for auto capture of orders with the right settings
- Order Fulfillment information from Agiliron to Amazon Marketplace

Retail POS

- Add/Delete **Retail POS**
  - Select Inventory Location, PriceBook, Tax Authority - Products, Inventory and Pricing automatically accessed in POS
  - Unlimited number of lanes (depends on edition) - adding a lane is as easy as a PC and Internet connection
  - Select Payment Methods, Credit Card Processing through Intuit Payment Services
  - Customer Receipts - Print, Email or Disable depending on usage model
  - Customizable User Interface with Company Logo, Information, Quick Access Buttons
  - iPad/Android Native POS App - Use the POS on your iPad/Android at tradeshows/events or in the store (download at iTunes Store or Google Play Store respectively)

- Add **Sales Associates - Free Users**
  - Unique Logins/Passwords, Change Password, Screen Lock, Logout
  - Sales Associate Permission Controls - Price Changes, Discounts, Sales Returns

- 110 **Quick Access Buttons** - Assign/Update Top-Selling Products associated with each button
- 110 **Quick Access Buttons for Categories** - Assign/Update Product Categories associated with each button - facilitates selection of products within those categories to add to ticket.
- Pull up **Product Information** - Image, Stock Information, Pricing

- **Payment Methods -** Cash, Check, Credit Cards

*   Processing a Customer **Sales Transaction**

    *   Add Product by Bar Code Scan, Auto-complete using Product Code/Product Name, Quick Access Buttons

    *   For Serialized or Lot Tracked Products, select Serial/Lot number

    *   Modify Pricing, Discounts as necessary

    *   Select Payment Method and enter parameters (or use credit card scanner for credit cards)

        *   Accept Split Payments (any combination of payment types)

    *   Record as Retail Sale or if Customer Information is available add (for new customer) or select (for existing customer); Update Customer Information for existing customers

    *   Sales Taxes automatically calculated based on selected Tax Authority for that POS channel

    *   Print, Email or Disable Transaction Receipt

        *   Customer Receipt Options - Electronic Signature, Gift Receipt

*   Processing a Customer **Return Transaction**

    *   Pull up order details based on Order number

    *   Print Return Receipt

*   Recorded Orders from Retail Store POS automatically captured to Agiliron CRM in real-time

*   Supported POS Hardware - See User Guide (http://www.agiliron.com/support/agiliron-solution-help/#User Guide/Retail POS/supported-pos-hardware.html)

Front Office (CRM)

Customer Account and Contact Management

*   Add/Edit/Delete **Customer Accounts**

*   **Account Form** Fields include

    *   Account Number - auto-generated

    *   Tax ID, Reseller ID for B2B Accounts

    *   Credit Limit - Credit Available and Account Balance auto computed based on Limit, Expiration and Receivables

    *   Allow Select in Channel (if channel is restricted to a specific set of company accounts)

    *   Defaults for Taxes, PriceBook, % Discount, Payment Method, T&C, Shipping Carrier/Method, Deliver From Stock Location - Automatically transferred to Sales Orders

    *   Customizable Sales Person list, Sales Area list, Sales Manager to associate with account

    *   Special Handling - Instructions for Special Handling of Orders for the Account, automatically transferred to Orders for the Account

    *   Backorder Handling Preference - Ship All, Ship As Available, Cancel Backorder Items; automatically transferred to Sales Orders for the Account

*   **Bulk Edit** of Account Fields - Change Field Values for multiple Accounts at once

*   **Import Customer Accounts** - CSV Format files, Custom Mapping of CSV File Columns to Fields

*   **Export Customer Accounts** - CSV Format files, Specify columns and List filters

- Customer Accounts Received from Sales Channels - Automatically created in the system

- Related Lists for each customer account available - Potentials, Contacts, Activities, Attachments, Quotes, Sales Orders, Sales Returns, Invoices, HelpDesk, Products, History associated with individual Accounts

- Add/Edit/Delete **Customer Contacts** - Many-to-one Mapping to Customer Accounts or Vendors (e.g. one organization, multiple contacts in the organization), Create Account and Contact in single step

- **Contact Form** Fields include

  - Name and Address information and associated Account or Vendor

  - Contact Profile - Customizable Multi-Select PickList (e.g. Buyer, Billing, Manager)

- **B2B Account ID management** from Back-Office (custom link for customer) - Create login accounts in B2B Stores and email a custom link for customer to login

- **Bulk Edit** Contact Fields - Change Field Values for multiple Contacts at once

- **Import Customer Contacts** - CSV Format files, Custom Mapping of CSV File Columns to Fields

- Export Customer Contacts - CSV Format files, Specify Columns and List filters

- Customer Contacts Received from Sales Channels - Automatically created in the system

- Related Lists for each contact available - Potentials, Activities, Attachments, Emails, Quotes, Sales Orders, Sales Returns, Purchase Orders, HelpDesk, Products, History associated with individual Contacts

Sales Management, SFA, Sales Cycle & Oppurtunity Management

- Add/Edit/Delete **Leads**

- **Bulk Edit of Lead Fields** - Change Field Values for multiple Leads at once

- **Import Customer Leads** - CSV Format files, Custom Mapping of Columns to Fields

- Export Customer Leads - CSV Format files, Specify columns and List filters

- **Bulk Change** Lead Status and Owner - Change Field Values for multiple Leads at once

- **Convert Leads** to Potentials, Accounts and Contacts with ease - auto transfer of all form fields and mapped custom fields during conversion

- Related Lists for each lead available - Activities, Attachments, Emails, Products, History associated with individual Leads

- **Capture leads from your Web site** forms directly into Leads module (Web2Lead API) - security token for authentication (embed in server side scripts e.g. php) of calls

- Add/Edit/Delete **Potentials**

- **Import Customer Potentials** - CSV Format files, Custom Mapping of Columns to Fields

- Export Customer Potentials - CSV Format files, Specify columns and List filters

- Create First Sales Order for Potential directly from Potential form

- Related Lists for each potential available - Contacts, Activities, Attachments, Quotes, Sales Orders, Products, Sales Stage History, History associated with individual Potentials

Marketing Automation to Customer Accounts/Contacts/Leads

- **Send Emails** to Leads/Customers - Automatically captured in the CRM and associated with Customer History for future reference
  - Full-featured HTML Editor for HTML Message Creation/Editing
  - Send Bulk Emails - Email Templates to multiple customers at once - filter customer lists through module custom views and associate custom actions for targeted campaigns
  - Automatically merge field values to replace markers in templates for bulk emails
- **CAN-SPAM Compliance**

Receiving Emails from Customers

- **IMAP** Protocol Interface Setup to connect with one/more email service providers
- Read Emails using the system **WebMail** user interface
- **Add Customer Emails to CRM** - automatically recognizes contact email address and associates email with existing customer (if any) or creates a new customer Lead
  - If an email is received from customer, the email is added to the Customer record
  - If an email is sent to customer from external tool (e.g. Outlook) and CCed to self (the IMAP mapped email address), the email is added to Customer record that the email was sent to
  - If an email is sent to customer from external tool (e.g. Outlook) from a non-IMAP mapped email address and CCed to the IMAP mapped email address, the email is added to Customer record that the email was sent to

Managing Customer Related Activities

- **Events** (calls or meetings, single or recurring) - Include Internal Users, Customer Contacts, Add Document Attachments/Notes, Email Notifications
- **Tasks** - Include Internal Users, Customer Contacts, Add Attachments/Notes, Email Notifications
- List View provides filtering for Open Tasks and one-click closing of activities
- **Work Orders** - Automatically generated by the system for Assembly product manufacturing with recipe information

Customer Support using HelpDesk

- Create, Assign and Track Customer Support **Tickets**
  - Case Message Center
  - Case by Priority
  - Case By Product
  - Queue Management & Case Assigment
- **eBay "Ask Seller"** Queries Automatically captured as Tickets and Responses automatically propagated to eBay
- **Ticket Statistics** - Review Cumulative Statistics on Open/Closed tickets, By Category, By Priorities, By Personnel
- **FAQ** - Create a Knowledge Base of FAQs for use by Customer Support

Orders (Sales Orders, Quotes, Invoices) Management

- Create/Edit **Quotes**
- **Quote Form** Fields include
  - Auto complete selection of customer account and contact
  - Auto fill of fields based on Customer Account
  - Auto complete of product selection, include item notes
- **Convert Quote** to Sales Order
- Export Quote to PDF, Directly Email PDF with pre-defined HTML template and mail-merge for fields
- Related Lists Available - Sales Orders, Activities, History associated with individual Quotes

- Create/Edit **Sales Orders - Credit Limit Checks for Customer Account**
- **Sales Order Form** Fields include
  - Auto complete selection of customer account and contact
  - Auto fill of fields based on Customer Account
  - Auto complete of product selection, include item notes
  - Status Tracking: Created, Invoiced, Shipped, Paid, Completed
  - Type, Priority, Ship Q Priority
  - Call Date (auto-generated based on Order Due Date)
  - Special Handling - Instructions for Special Handling of Orders for the Account; automatically transferred from the Account
  - Backorder Handling Preference - Ship All, Ship As Available, Cancel Backorder Items; automatically transferred from the Account
- **Multiple Customer Payments** for a Sales Order - Record date/amount/payment method details for each payment
  - **Process Credit Card Payments with click of a button using Intuit Merchant Services**
  - **PCI Compliance** with Credit Card data
  - See Total Payments, Amount Due
- **Create Invoice** from Sales Order (Invoice Number automatically generated)
- **Cancel Sales Order** (before Fulfillment), Payable created if Customer Paid
- **Create Sales Return** for a Sales Order (after Fulfillment)
- Create and **Manage Backorders** (for orders where some of the products are not in stock)
- Export Sales Receipt, Invoice, Packing Slip to PDF, Directly Email PDF with pre-defined HTML template and mail-merge for fields
- **Bulk Printing** of Sales Receipts, Directly Email PDF with pre-defined HTML template and mail-merge for fields
- Customer (Account) **Credit Limit Checks** for Create/Edit of Sales Order
- Setup **Auto Order Notifications** by Channel - (a) Order Creation Confirmation, (b) Order Fulfillment Confirmation, (c) Order Modifications, (d) Backorder
- **Customize Auto Order Notifications** - Content and Recipient List

- Related Lists Available - Quotes, Invoices, Activities, Attachments, History associated with individual Sales Orders

- **Create Invoices**
- **Invoice Form** Fields include
  - Total Payments, Amount Due
- Export Invoice to PDF, Directly Email PDF with pre-defined HTML template and mail-merge for fields
- Related Lists Available - Sales Order, Activities, Attachments, History associated with individual Invoices

Managing Orders from Sales Channels

- Orders from all Sales Channels Automatically captured under "Sales Orders" module in real-time from channel
  - **"Subject"** field includes channel of origin, **"Channel"** field contains the channel of origin
  - **"Channel Order ID"** captured in the Sales Order for traceability
  - Any additional channel related fees (e.g. eBay fees) captured in **"Additional Fees"** field
  - Route orders to appropriate stock locations
- Update/Modify or Cancel Orders or Create Returns in a unified manner
- Updated Order Information - Fulfilllment Information automatically propagated to channel of origin

Sales Returns

- **Sales Return Form** Fields include
  - RMA # (w/ optional auto-generation), Tracking #
  - Create from an existing Sales Order or without
- Track Receipt of Returned items at Receiving, Payables for Refund to Customer

Order Fulfillment

- **Shipping** Module - Select Carrier, Shipping Method
- Only orders waiting to be fulfilled displayed by default, fulfilled orders also available for view/edit in separate view
- Record **Fulfillment** information - Date, Carrier, Shipping Method, Actual Shipping Cost, Tracking Information, Serial/Lot #s (if applicable)
- **Bulk Fulfillment** - Ship multiple orders at once
  - Import Shipping Information from external shipping tool (if necessary)
  - Export Order Information for external shipping tool (if necessary)
- Export Packing Slip PDF, Bulk Export for multiple orders
- Create and **Manage Backorders** (for orders where some of the products are not in stock)
- Customer (Account) **Credit Limit Checks** on "Shipping" (Optional)

> **"**Sales have increased, and the overall efficiency of the site has improved. These are key to our success, especially as orders increase and fulfillment becomes a major hurdle. The overall solution has been the most important. We have complete control of our product and inventory management. Since we do both retail and wholesale sales, product has to be updated almost daily; which we are able to do easily. **"**
>
> *- Nate Koach & Jason Reed, Owners, Suburban Riot*

Accounts Receivable

- Displays Unpaid customer sales orders
- **Record Payments** as they are received for each order
- Generate **Customer Statements** by Customer(s) - Includes all pending receivables and payments received
- Record payments received from customer that cuts across multiple orders - payments applied to oldest order first, payments automatically split if partial amount applied to an order
- Export Sales Receipt to PDF, Directly Email PDF with pre-defined HTML template and mail-merge for fields

Back Office (ERP)

Product Catalog

- **Product Types**
  - Basic Products (inventory by number of items)
  - Serialized inventory (serial numbers per inventory item)
  - Matrix Item inventory (SKUs by Size, Color, Style etc.)
  - Lot Tracked inventory (lot numbers for set of inventory items)
  - Assembly products (manufacture from raw materials)
  - Non-inventory products – Services (e.g. labor)
  - Product Customizations (e.g. Gift Wrapping options, Engraving Text or Gift Wrapping message)
  - Product Substitutes (suggested alternates)
- **Product Form** Fields include
  - Product Code, Bar Code
  - Unit Cost, automatically calculated for Assembly products
  - Commission Rate
  - Usage Unit (unit of usage of the product - inventory should operate on these units)
  - Qty/Unit for managing fractional or multiple items per inventory unit
  - Stock Manager for inventory notifications
  - Accounting Information (Income, Expense, COGS, Asset, QB Item, Tax Category)
  - Shipping Information - Volume, Weight, Shipping Cost (for individual product shipping method only)
  - HTML Editor for Product Description
  - Product Category (select one or multiple)
  - Unlimited Images Per Product (include color swatches)
  - Manufacturer Association
  - Short and Long Descriptions

- SEO Meta Tags - Title, Description, Keyword
- **Bulk Editing** of Product Fields - change field values for multiple products at once
- **Import Products** - CSV Format files, Custom Mapping of Columns to Fields
- **Import Product Images** - Bulk import of all product images referenced in Product import CSV file
- Export Products - CSV Format files, Specify columns and List filters
- Add **Custom Fields** for "Browse By" product search in webstore
  - Make Custom Fields Applicable to specific Products only or All Products
- Related Lists Available - Stock Locations, Serialized/Lots/Matrix Items, Stock Adjustments, Price Books, Channels, Vendors, Purchase Orders, Quotes, Sales Orders, Sales Returns, Invoices, Activities, Attachments, HelpDesk, History associated with individual Products
- **SEO** Title, Keywords, Description Support for Products, Product categories & Manufacturers

Price Books Management

- **Unlimited Price Books** By Customer Segment, Sales Channel or other criteria
- Associate any number of pricebooks with a product
- **Specials Price Book** for Promotions - Set Validity windows; Associate with Reference List Price Book
- **Vendor Price Book** for Product Vendors
- **Adjust Pricing** for selected products at once by amount or % with user selected rounding rules
- **Differential Pricing** for Product Matrix SKUs
- **Differential Pricing by Stock Location**
- **Import Price Books** - As part of product import as columns in CSV file

Product Categories Management

- Allows creation of **Product Category hierarchy tree** (no depth or number restrictions)
- Easily **Adjust Category Display Order** by assigning an order ID
- Assign a **Product to Multiple Categories**
- Associate Image and Description with Product Categories - automatically included in category pages on stores
- **SEO** Information for Product Category Pages - Title, Keywords, Description
- All changes to Product Categories automatically synced with the channels

Product Manufacturers/Brand Management

- Add/Delete **Manufacturers**
- Associate Image with Manufacturers - included in manufacturer pages on stores
- **SEO** Information for Product Category Pages - Title, Keywords, Description

Sophisticated Inventory Management

- **Basic Products**

- Add/Change
- Adjustments
- Transfer

- **Matrix Item Products**
  - Add/Change
  - Delete/Restore SKUs
  - Adjustments
  - Transfer

- **Serialized Products**
  - Add
  - Edit/Delete
  - Adjustments
  - Transfer

- **Lot Tracked Products**
  - Add
  - Edit
  - Adjustments
  - Transfer

- **Assembly Products**
  - Add/Change - Inventory Automatically pulled from Raw Materials, Works Orders generated for Manufacturing, COGS for manufactured product automatically calculated
  - Adjustments
  - Transfer

- **Service Products**

- Manage Inventory at **Multiple (Unlimited) Stock Locations**
- **Inventory Transfer** between Stock Locations - Individual Products or Bulk Transfer of many
- **Inventory Tracking** Parameters - Qty in Stock, Qty on Order (SO), Qty on Order (PO)
- **Reorder Levels, Inventory Notifications and Supply Chain Management**
- **Inventory Adjustments** (+/-) and Reconciliation
- Product and Inventory Reimport - All Fields or only Inventory fields

Multi-Channel Tracking and Auto-sync of inventory across Channels

- **Events that Automatically Trigger Inventory Synchronization** across channels
  - Orders from any channel (WebStores, POS, eBay) automatically pulls inventory (decrements) available for sale on all channels (that a product has been placed in) to prevent selling inventory not available
  - eBay Listings provide an option to Lock Inventory (committing inventory for sale on eBay) which also results in associated inventory being pulled from other channels

- • Any manual inventory adjustments made (due to audit or shrinkage or other reasons) also automatically adjusts inventory in the channels to reflect the new inventory levels

- • **Actions Associated with Inventory Synchronization** for above Events

  - • If the available inventory (Qty on Stock - Qty on SO (Sales Order)) falls below the inventory that was placed in any channel - the quantities in the channel is adjusted to available inventory

  - • For Matrix Item products, since all the inventory is placed in the webstore channels, the quantities are always adjusted on the above events

- • **Optional Auto-Sync** (User Selection) for WebStore Channels

  - • Auto Product Update - Any changes to product (triggered by save product) are immediately updated on the channels that the product is placed in (this includes all the product form fields including images)

  - • Auto Category Update - Any changes to product category information is automatically updated to channel(s) along with any product mapping changes that may result

  - • Auto Inventory Update - Any changes in inventory of a product (manual edits - Add/Delete/Change/Transfer) automatically updates the inventory in all the channels that the product is placed in to available inventory (Qty in Stock - Qty on SO). This switch always deploys the entire available inventory to the channel - so if the user wants only a subset of the inventory to be deployed to a channel, they should leave this switch off and deal with it manually

  - • Auto Pricing Update - Any changes in the pricing of a product in a a Price Book automatically updates the pricing in all the applicable channel(s)

Supply Chain - Vendor Management

- • Add/Edit/Delete **Vendors**

- • **Vendor Form** Fields include

  - • Credit Limit - Credit Available auto computed based on Limit, Expiration and Payables

  - • Defaults for Taxes, PriceBook, Discount, Payment Method, T&C, Shipping Carrier/Method, Deliver To Stock Location

- • Associate Vendor for Specific Products with Vendor Pricing (Vendor Price Book created automatically on vendor creation), Vendor Part Number and Vendor Units (to convert to specified inventory units at Receiving)

- • Related Lists Available - Contacts, Purchase Orders, Activities, Attachments, Products, History associated with individual Vendors

- • **Import Vendors** - CSV Format files, Custom Mapping of Columns to Fields

Purchase Orders

- • **Purchase Order Form** Fields include

  - • Auto complete selection of vendor and contact

  - • Auto fill of fields based on Vendor selection

  - • Auto complete of product selection filtered by Vendor associated products, Auto selection of Vendor Pricing, include item notes

  - • Related Sales Order(s) (if auto generated from Sales Order)

  - • Status Tracking: Created, Shipped, Received, Invoiced, Paid, Completed

- Export to PDF, **Directly Email PDF** with pre-defined HTML template and mail-merge for fields
- **Bulk Printing PDF,** Directly Email PDF with pre-defined HTML template and mail-merge for fields
- **Auto Generation of POs from Customer Sales Orders** (e.g. for businesses that do not carry inventory like Drop-Ship or Custom Build to Order businesses)
- Related Lists Available - Activities, Attachments, History associated with individual Purchase Orders

Receiving

- Receiving - record receiving inventory, serial/lot numbers (if applicable)
  - **Auto conversion of vendor units to inventory units** based on vendor product preferences
- **Bulk Receiving** of multiple Purchase Orders

Accounts Payable

- Displays unpaid purchase orders
- Record payments as they are made

Accounting - QuickBooks Integration

- Intuit Partner Platform Integration - on Intuit App Center (http://appcenter.intuit.com/agiliron)
- Import QuickBooks Lists (Chart of Accounts, Item List, Payment/Shipping Method, Tax Rates etc.)
- Exporting All transactions (SO, Returns, PO, Inventory Adjustments etc.)

Sales Channel Management

- Add/Delete **Unlimited Number of Channels - B2B Webstore, B2C Webstore, Remote WebStore, eBay, Retail POS**
- **Auto Sync of Inventory across all Channels**
- Auto Sync of Product Catalog, Pricing, Category, Inventory Changes in Back-Office automatically to all relevant Channels
- Individual Channels can be configured for Inventory Location, PriceBook, Shipping/Payment/Tax Parameters and Channel-Specific configuration...see "Channels" section for Channel-Specific Information
- **Unified Tracking, Capture and Management** of Orders, Accounts, Customers Across All
- **Uniified Merchandising** - Single point of selection and deployment of products (all or selective) from catalog to all channels with channel specific pricing and quantities
- All information exchange handled over **secure HTTPS**

Business Intelligence

Standard Reports

- **Account and Contact Reports**
  - Contacts By Accounts

- Contacts Without Accounts
- Contacts By Potentials
- Accounts Export Report
- Contacts Export Report
- Accounts Without Contacts
- Sales By Customer Account
- Products Purchased By Customer Account

- **Lead Reports**
  - Lead By Source
  - Lead Status Report
  - Leads Export Report

- **Potential Reports**
  - Potential Pipeline
  - Closed Potentials
  - Potentials Export Report

- **Activity Reports**
  - Last Month Activities
  - This Month Activities

- **HelpDesk Reports**
  - Tickets By Product
  - Tickets By Priority
  - Open Tickets

- **Product Reports**
  - Product Details
  - Products By Contacts
  - Product Location Report
  - Products Export Report
  - Product by Product Category
  - Customer Accounts By Product
  - Products by Matrix SKUs

- **Quote Reports**
  - Open Quotes
  - Quotes Detailed Report

- **Purchase Order Reports**
  - Purchase Orders By Contacts
  - Purchase Orders Detailed Report

- **Invoice Reports**

- Invoice Detailed Report
- **Sales Order Reports**
  - Sales Orders Detailed Report
  - Total Sales
  - Paid Sales
  - Sales By Rep
  - Sales By Channel
  - Sales By Customer Account
  - Unpaid Sales By Customer Account
  - Sales By Rep - Shipped
  - Sales By Inventory Location
  - Sales By Product Category
  - Sales By Product
  - Sales Orders with Product Details
  - Sales Orders with Product Matrix SKU Details
- **Shipping Reports**
  - Shipping Detailed Report
  - Sales Order Export for Shipping Carrier
- **Accounting Reports**
  - Receivables Detailed Report
  - Receivables By Accounts

Standard Reports Customization and Data Filtering

- Select Tabular or Summary Reports
- **Select Desired Columns** by Fields
- Select **Date Filters**
- Select **Field Filters**
- Select **Grouping and Sort Order**
- Select **Columns to Add** for Summary

Create Custom Reports

- Select One/More Modules to be Associated with Report
- Select Customization and Data Filtering Parameters
- Add to an Existing or New Folder

Export Reports

- CSV
- PDF

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Product Data Sheet

Realtime Dashboard

- Sales By Channel
- Product Sales By Channel
- Sales By Location
- Sales By Category
- Sales By Product
- Sales By Account
- Sales By Users
- Accounts Receivable
- Accounts Payable
- Pipeline By Sales Stage
- Pipeline By Month By Outcome
- Potentials By Lead Source By Outcome
- Potentials By Lead Source

- Customize Charts - By Date Range and Selection of Parameters specific to the chart
- Add Selected Chart to Home Page

Home Page - Business Snapshot

- My Upcoming & Pending Activities
- My Top Accounts
- My Top Open Potentials
- My Group Task Allocations
- My Pending HelpDesk Tickets
- Key Metrics - Customizable (modify existing ones and/or add new ones)
- My Top Quotes
- My Top Sales Orders
- My Top Invoices
- Calendar
- User Selected Dashboard Chart

Team Collaboration

User Management

- **Create & Manage Users**
  - Profiles, Roles, Users, Administrator can Reset Password for users (auto-generated password emailed to user)

- **Create & Manage Groups**
  - Add Users to Groups

Role Based Security

- Based on User Profile constrain access at the Module level or at the Field Level - View, Create/Edit, Delete Privileges

Business User Collaboration

- **Calendar**
  - Team Collaboration Calendar
- **Activities**
  - Calls, Meetings, Tasks, Work Orders - See "Front Office CRM" section for details
- **Notes and Attachments**
  - Add Reference Notes and Document Attachments to all Entities in the system

Email

- See **"Front Office (CRM)"** section for details.