



focus on essentials

## Contact and Activity Manager



An effective customer relationship management system is vital to any business. A good system means current, up-to-date information about the people and the day-to-day activities that affect your business. The SX.enterprise Contact and Activity Manager (CAM) is designed to control general customer interaction and status management, but it goes even further to provide an ideal project management tool. This concise, graphical module is tightly integrated with most other SX.enterprise modules—available from most SX.enterprise windows—to provide a one-system approach for managing contacts and activities.

Through "parent" activities, CAM becomes a time-management or project-management tool

➔ solutions:  
Distribution Essentials  
Enterprise, SX.enterprise

**Control customer  
interaction and status  
management**

Each business event can have multiple activities associated with it, involving those people in your company that will get the job done. This parent/child activity relationship provides the ability to verify that all activities for this single event have been completed. At a glance, you can see everyone involved with an event, what has been done and what needs to be done. The activity repository is updated periodically so you'll stay on top of activities as they enter the system.

### Eliminate Duplicate Company Information

You can create one contact and assign it to a number of "subjects" in SX.enterprise. Subjects are defined as vendors, customers, ship to locations, ship from locations, products, and prospects. This assignment ensures that you avoid having duplicate contact information in the database.

### Third-Party Synchronization

Should you decide that you need a more full-bodied database program for marketing activities such as prospecting, campaigns, or proposals, CAM easily interfaces to programs like ACT!®, GoldMine®, or Microsoft® Outlook™98. This third-party interface will also keep employees on the road in touch with what's happening while they're out of the office. Contact information can be downloaded from CAM to their GoldMine or Act databases before they leave the office.



➔ **BUSINESS OBJECTIVES:**

An ideal project management tool to control customer interaction and status management.

➔ **BENEFITS:**

Manage contacts and activities.

## Contact Information Export Capability

Now you can perform a full search and sort of your contact information and export it to a Microsoft Excel™ spreadsheet. Naturally, this allows you to manipulate the data and perform Microsoft Windows™ functions, such as mail merge.

## User-defined Data Elements

As a user, you want the capability to track information pertinent to your business based on your own requirements and information. CAM provides 30 user fields that you can define to suit your business needs.

## Events-Based Program

When a business "event" occurs—such as a purchase order is late, a sales order wasn't shipped on time, or a new customer should be established—it is easily added to CAM through the interface to Event Manager. An administrative option will allow activities created in Event Manager to populate CAM.

## Conversion to CAM

If you currently use Customer Marketing, you can migrate your contact records, activities, activity codes, and result codes to the CAM module in a one-time conversion. Conversion programs will be available to run after SX.enterprise v.3.0 is installed. The two products—Customer Marketing and CAM—do not run concurrently.

## Summary

A business cannot afford to be without up-to-date, detailed information about people and activities. You need a strong, streamlined tool at your fingertips—one that will track the activities that make up the relationships with your customers and keep you current with people and projects. SX.enterprise's integrated Contact and Activity Manager will help you manage these elements of your business.



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