

# Exact InterConnect: Overview

## Gain even more sales power from Exact Synergy

A company's ERP information typically resides in one place or application, while sales and marketing data lives in another. InterConnect from Exact Software™ bridges the front and back-office gap by extending the Synergy feature set with enhanced customer management capabilities, including prospecting, funnel management, and quotation planning. These capabilities alone will reduce your carrying costs on inventory by putting you in a better position to react quickly to customer demand.

### Put to Use What is Already Available

Your company already has the information it needs to accomplish sales force automation, so it should be utilized. As InterConnect makes your ERP information directly available to you while providing additional CRM features, your company will now realize full sales automation and sales management functions and features.

Sales quoting and funnel visibility, as well as live access to order entry pivot analysis, inventory traces, manufacturing views and purchasing reports, are just some of what can be accomplished within Exact InterConnect. As a tool that works in real-time, there is no data translation or synchronization required.

### Get to the Source

Exact InterConnect is both an extension of and addition to Exact Synergy functionality, making use of Synergy's powerful workflow features, while directly connecting to the Exact Macola® and Exact Globe™ table structures. InterConnect feeds off of your ERP data in real-time from your back office to use in your front office sales management for a more powerful CRM feature set within Synergy.

Exact InterConnect consists of a set of add-in modules for Synergy, fully integrating with Exact ERP systems, including Macola ES, Macola Progression® and Exact Globe:

■ **Exact Globe, Macola ES, and Macola Progression:** Gain extended views into your ERP data, delivering a complete solution for your distributed sales team. Complete quoting, sales funnel and sales management functions will now be based on your real-time ERP data.

■ **Synergy Indexer:** Unlock the data stored in your PDF and other binary data files by indexing them in Synergy. The Synergy Indexer module extends the indexing capabilities of Synergy to PDF, xls, and several other binary file types.



### Exact InterConnect benefits:

- View back-office transactional data from multiple Exact ERP systems
- Track sales statistics using standard Synergy analysis tools
- Observe sales histories and orders, as well as open orders and quotes
- Enter Macola and Globe quotes directly over the Internet
- Print, fax or email PDF quotes directly from Synergy
- Allow customers to view their orders and track shipments via their customer portal
- Drill into ERP data for true transaction-level details

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## Robust CRM Capabilities, and More

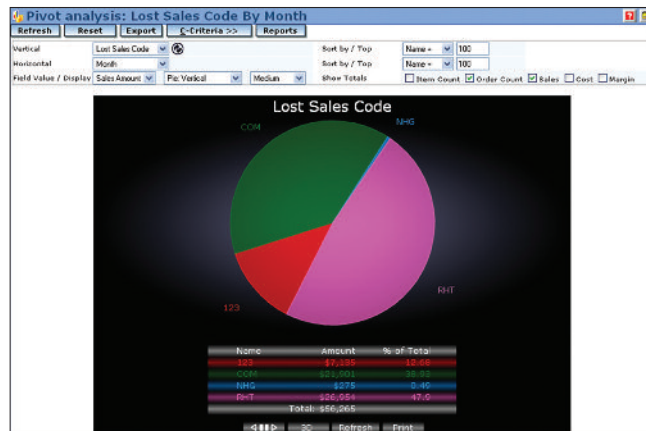
The real power of your business lies in the ERP data. Exact InterConnect hooks directly into that potent information and pulls it into an Exact Synergy interface that has powerful CRM capabilities. InterConnect will provide your sales team with additional features such as:

■ **Quote Generation:** Information such as items, costs, accounts, etc. can be pulled directly from Macola or Globe to generate a new quote. The quote will appear on the sales funnel report, can be assigned to multiple sales people for commissions purposes, and can be printed or emailed as a PDF or Word document, where it is saved against the CRM card.

■ **Sales Funnel Management:** Drill down into a working quote report, whereupon quotes can be moved out 30, 60, 90 days, etc. or turned into a "lost sale", with notes. A "Workflow Phone Queue"/phone icon, when clicked upon, will open a call notes Workflow Task with standard Synergy capabilities.

Probability	Quote Total by Close Date	Total				
	Late	July	August	September	Beyond	
Hot	Sales Amount: 8,455	9,300	122	263	406	18,547
	Count: 1	2	1	1	1	6
Warm	Sales Amount: 7,649	53	18,412	7,007	25,746	59,167
	Count: 4	1	2	2	2	11
Cold	Sales Amount: 2,182					2,182
	Count: 1					1
Dead	Sales Amount: 21,726					21,726
	Count: 1					1
<b>Total</b>	<b>19,810</b>	<b>9,863</b>	<b>18,547</b>	<b>8,270</b>	<b>25,852</b>	<b>102,873</b>

Salesperson	Last Payment Date	Commission	Sales Amount	Comm %	Order Cost	C to M %
123_456_789	02/14/2005	5,174.22	25,929.74	15.0%	8,795.34	19.4%
AMT	02/25/2005	53.25	395.00	15.0%	58.35	17.4%
BUSCH ELECTRONICS, INC	02/18/2005	22.22	295.00	15.0%	38.88	17.9%
CONVEY AUTOMATION	05/05/2005	1,745.50	10,970.00	15.0%	2,618.25	19.1%
CIRCUIT TECHNOLOGY	04/24/2005	2,304.60	23,244.00	15.0%	4,048.45	20.1%
GLARSON	02/14/2005	226.80	2,940.00	15.0%	444.89	20.1%
GRATER, JAMES PERRY, D.D	02/12/2005	2,743.80	19,660.00	15.0%	5,539.13	18.7%
KUHNLEIGH REPRESENTATIVES, INC.	02/12/2005	8,223.31	33,370.00	15.0%	6,796.74	19.0%
LONG PRODUCTS	05/20/2005	3,213.00	8,796.00	15.0%	5,200.57	18.1%
ELECTRONIC SALES ASSOCIATES	02/17/2005	674.45	4,495.00	15.0%	972.41	15.1%
HI TECH SOLUTIONS, INC.	02/07/2005	0.00	490.00	0.0%	200.00	0.0%
THE TELEPHONE SERVICES	02/18/2005	17,113.61	82,880.75	14.6%	30,076.35	19.4%
LAPA INTERPRISES	04/29/2005	6,236.43	43,822.50	14.9%	9,822.12	19.2%
MAFC TECHNOLOGIES, INC.	02/18/2005	28.22	220.00	15.0%	47.51	19.0%
MATVIS SALES, INC.	05/21/2005	1,125.22	14,168.00	15.0%	2,430.95	20.2%
METROPCS AUTOMATION	05/05/2005	0.00	1,295.00	0.0%	390.00	0.0%
MARKET & PERSONAL CO	02/13/2005	6,243.92	44,873.00	14.0%	11,200.06	19.9%
PAC SOUTH INC	05/03/2005	10,646.33	67,180.01	15.0%	16,491.40	19.8%
PERCIVAL LINTSE	04/25/2005	4,758.24	33,390.26	14.0%	6,121.37	17.1%
PRODUCTION AUTOMATION CORP	04/06/2005	28.52	990.00	13.0%	134.87	20.3%
SISRA MANUFACTURING TECHNOLOGY	04/26/2005	1,817.80	8,760.00	15.0%	1,514.37	19.2%
TECHNORIS	04/24/2005	1,233.82	11,254.00	14.7%	2,002.90	19.6%
TONGE ELECTRONICS S	02/13/2005	6,022.11	42,154.00	14.9%	7,182.74	17.1%
<b>Total</b>		<b>72,285.21</b>	<b>484,492.74</b>		<b>146,449.27</b>	
<b>Total Cost</b>			<b>389,498.27</b>			
<b>Cost Margin</b>		<b>375,003.51</b>				
<b>Total Commission</b>		<b>-72,285.21</b>				
<b>Total Margin</b>		<b>99,999.99</b>				<b>19.0%</b>



■ **Business Process Administration:** Because sales management touches many facets of an organization, InterConnect can be driven around business processes in addition to quotes and funneling. A Workflow Task can be generated and associated with any resource that might be affected, such as a support person, marketing project or asset. A Request can also be directly selected from the quote to be put through as a Document attached to the Request.

■ **New Sales Information:** Consequential and meaningful sales information is now available to sales teams that comes from your ERP data. Sales type classifications (hot/warm/cool), close dates, unit pricing and full pricing are included in the InterConnect interface.

Your sales team deserves as much information as they can get to, in order to close deals, make their numbers, and generate revenue. Exact InterConnect puts the muscle of your ERP data into Synergy to give even more strength to your sales management efforts.

With the ability to view live inventory and manage sales funnels through mini dashboards as they relate to your company's sales, all the while working in Synergy's collaborative environment, the entire sales channel will stay in sync with their goals and quotas. Exact InterConnect makes more CRM functions available to Synergy, so that sales teams can focus on closing deals instead of paperwork.

For more information about *Exact InterConnect*, please contact your Exact Software business partner or account representative today, or visit [www.exactamerica.com/interconnect](http://www.exactamerica.com/interconnect).