

## Powertrak™ Core

More than ever, organizations today are challenged to provide complete customer service to the right customers and keep them happy. Selling, marketing and servicing now involve more than just customers -- It involves multiple business partners, consultants, and even the Web.

Powertrak provides high-tech companies, member-driven associations, and other Microsoft technology-centric companies with award-winning solutions to speed up all customer interactions, get rid of paperwork, accept payments and maintain the best relationships. Along with Microsoft Dynamics CRM, Powertrak is focused to small and mid-sized organizations needs. Powertrak offers each user in every department of an organization one sure path to efficiently service, support and extend the customer experience.

Rising costs and tight margins keep organizations today under constant pressure to improve return on marketing, service, and sales investments. Savvy businesses have found that Microsoft Dynamics CRM can provide a solution that costs less and delivers a great foundation for their CRM investment. And when these businesses need tailored business solutions to streamline their unique processes, they turn to the Powertrak modules and Application Builder to extend the functionality of their Microsoft Dynamics CRM investment. Powertrak has all the functionality of the award-winning Worldtrak® CRM product line and is built right on top of Microsoft Dynamics CRM -- turn on Powertrak and go!

Powertrak offers rich capabilities that extend far beyond account management and incident tracking, with the scalability to handle large volumes. Powertrak offers the world's best Microsoft Dynamics CRM add-on modules including credit card acceptance and processing, advanced marketing, customer and partner portals, call center, technical case management, XML integration and workflow.

Powertrak also offers a sophisticated suite of specialized vertical industry solutions and enhancements to Microsoft Dynamics CRM including the following capabilities:

- **High-Tech Industry Solution set**
- **Non-Profit and Association Management Solution set**
- **Powertrak Core functionality and modules**
- **Integrated credit card payment processing**

## Product Summary

### Powertrak™ Core Solutions

- Powertrak Core Extensions
- Marketing Campaign Management
- Call Center
- Service Management
- Customer and Partner Portals
- Workflow

### Powertrak™ Industry Solutions High-Tech

- Multi-Channel Forecaster
- Dynamic Product/Pricing Configurator
- Partner and Customer Service Portals
- Education/Certification

### Non-Profit Associations

- Membership Management
- Committee Management
- Legislation Tracking
- Event Management

## **Product Details**

### **Browser-based Email Blaster with Templates**

Powertrak PhoneBook enhances the e-mail functionality of Dynamics CRM 4.0. In PhoneBook you can build a list and blast emails to selected targets using Dynamics CRM 4.0 templates, Powertrak templates, HTML or Microsoft Word. Supports rich HTML format and savable public and personal lists.

### **In-line De-duplication Manager (PT V9)**

Powertrak supports definable multiple match keys, operates in real time, and extends to objects outside of name/address records.

### **Pipeline Manager**

Pipeline Manager saves time by allowing in-line edit functionality thus eliminating the need to open each record. Pipeline Manager is completely configurable with no coding. You can build similar editable grids against virtually any data items.

### **Mass Update**

Powertrak supports configuration of unlimited, definable mass updates across any table and data item using Application Builder.

### **Enterprise Views**

Powertrak Enterprise Views enhance the activity view functionality of Dynamics CRM 4.0. CRM 4.0 activity views consolidate activities of direct contacts at the account level. With Powertrak Enterprise views, CRM users working with accounts that have sub accounts, can view consolidated activities, contacts, opportunities and channel/partner opportunities for all sub accounts associated with the enterprise.

### **PhoneBook**

PhoneBook provides single screen advanced search across multiple tables and linked parent-child views. For example, finding customers who are interested in one or more products within a given date range is built-in. PhoneBook is a type to load search tool, saving end-user's time, particularly in service and call center environments. PhoneBook and all advanced Powertrak searches execute as you type eliminating keyboard to mouse movement. PhoneBook includes advanced interaction functions to enable email blasts from templates, record activities, and add selected records to queues.

### **PowerRelate threaded Multi-Channel activity discussions with Process Tracking**

The PowerRelate capabilities in CRM 4.0 activities track all responses in a visually intuitive navigation tree. With Powertrak, all CRM activities can be cross-associated to both a business partner and the prospect/customer. Process definitions tag and group Activities by business process, activity type and next action, which are logical tiered combo boxes.

### **PowerRelate—Enhanced Relationship Tracking**

PowerRelate capabilities present many-to-many, hierarchically branched trees of relationships between accounts, contacts, activities and opportunities. PowerRelate saves time by eliminating the need to open individual forms by displaying call notes, account and contact information, at any tree level, in a split-screen view. Furthermore PowerRelate allows for simple, end-user configuration.

### **Dashboards for Real-time Analytics**

Powertrak includes a configurable dashboard, with built in analyzers for all department functions such as marketing, service, portals, channel, pipeline management and call center operations.