

CohesiveCRM™ Module for Sage MAS 90 and 200

Product Information

Conative Systems, Inc. (CSI) has spent over two decades developing and implementing service industry software systems. Our software modules have been well received within the sales and service industry and we are confident that the value received from our products will significantly enhance your operations.

This White Paper brings out the benefits of CohesiveCRM and related Sage MAS 90 and 200 Accounting elements for managing your business from the service department to accounting.



White Paper

Conative Systems, Inc, has been in business since 1990. Our focus has been the service and repair industries. Over two decades we have developed and implemented industry specific business management systems integrated to the robust Sage MAS 90 and 200 Accounting system.

The Service Manager products are easy to install, easy to train, and simple to operate for first-time Users. As a result of streamlined functionality and value-added features we are well received by both End Users and Management. The unique features we offer can enhance your competitive edge and reduce cost. We believe that the inclusion of Service Manager in your operations will further your company's long-term strategy.

Our years of experience in implementing business systems places us in a unique position to offer qualified consulting and implementation services to ensure a successful business system.

Keeping up with trends and delivering vital products is a job we take seriously. Upgrades are typically delivered quarterly and consists mostly of new features such as new reports, added User requested functions, and database updates for pricing, flat rates, etc.

Our relationship starts with the installation and continues well after post-implementation. Useful upgrades and information is offered throughout the year. Customer feedback and our own research is compiled into valuable upgrades and newsletters and automatically sent to our clients.

Contact Us

For more information about Service Manager System. Please call us at (951) 694-5333 or send us an email to: info@conativesystem.com

Conative Systems, Inc.

Service Manager Business Solutions

White Paper

CohesiveCRM™ - Overview

Unified system of CRM, Service, and Accounting functions. CohesiveCRM manages immediate needs like follow up's, contact management, alerts, and sales reports - but also addresses quotes, actual orders, while fully integrated with service functions and history as well as accounting information. All this provides for informed decision making from initial contact to follow up, sales, and customer relationship management.

Managing the Contact

The screenshot displays the 'Sales and Relations Manager' application window. The main area is titled 'CONTACT' and shows a form for 'Randy Gross'. The form includes fields for Name, Company (Mass. Ave. Surgery Ctr), Title, Phone, Mobile, Email, Skype ID, Sales Agent (JIM JONES), and RBM (JIM JONES). The Address section contains Address1 (5400 Goldsboro Rd), Address2 (Ste 400), Address3, City (Bethesda), and State/Zip (MD 20017). The Status and Classifications section includes Sales Status, Contact Class (End User/Customer), Lead Type (QUALIFIED), Pipeline Status (Committed 90%), and Source Name. Below the form is a 'Company' section with 'A/R Account' (00MAS010) and 'Location' (Mass. Ave. Surgery Ctr). At the bottom, there is a table of activities with columns for Class, Priority, Created, Created By, Last Dt, Last By, For, Message, and Reminder.

Class	Priority	Created	Created By	Last Dt	Last By	For	Message	Reminder
Quote Created		20090909	CS1				Quote (000010911) has been created.	20090909
Quote Created		20091005	CS1				Quote (100000485) has been created.	20091005
Opportunity Added		20091006	CS1	20091006	CS1		An opportunity has been added to the c...	20091006
Remark Added		20091006	CS1	20091006	CS1			20091006
Opportunity Added		20091018	CS1	20091018	CS1		An opportunity has been added to the c...	20091018
Opportunity Added		20091201	CS1	20091201	CS1		aaaaaaaa	20091201
Remark Added		20091201	CS1	20091201	CS1		An opportunity has been added to the c...	20091201
Opportunity Added		20091202	CS1	20091202	CS1		An opportunity has been added to the c...	20091202
Remark Added		20091202	CS1	20091202	CS1			20091202
Opportunity Added		20091203	CS1	20091203	CS1		An opportunity has been added to the c...	20091203
Remark Added		20091218	CS1	20091218	CS1			20091218

This is the main window for adding and managing contacts. Here you can view all related activity including sales and service history, credit checks, payment history, open orders, etc.

Add opportunities, quotes, remarks and notes. Forward any of these records to other contacts. You may also send and receive emails, keeping a copy of the email viewable here.

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Managing the Company

The screenshot displays the 'Sales and Relations Manager' application window. The main area is titled 'COMPANY' and shows a record for '00MAS010'. The record includes the following fields:

- Name:** Mass. Ave. Surgery Ctr
- Type:** Lead
- Distributor:** 00MAS010
- Phone:** (301)263-0800
- Mobile:** [Empty]
- Email:** [Empty]
- Address:**
 - Address1: 6400 Goldsboro Rd
 - Address2: Ste 400
 - Address3: [Empty]
 - City: Bethesda
 - State/Zip: MD 20817
- Classifications:**
 - Account Class: Surgery Center
 - Sales Status: [Empty]
- AviOpen/Limit:** 2,500 / 0 / 2,500
- Terms Desc:** No Terms
- Notes:** [Empty text area]
- Last Activity:**
 - Edit Date/ID: [Empty]
 - Attempt/Reach: [Empty]

Below the main form is a 'View Customer' button and a tabbed interface for 'Activities', 'Opportunity', 'Remarks', 'Quotes', 'Orders', 'Serv Hist', 'Sales Hist', 'Sold Units', 'Emails', 'Serv Notes', and 'Contacts'. The 'Contacts' tab is active, showing a table with the following data:

Name	Title	Sales Manager	Created
Randy Gross		JM JONES	

This is the main window for the company (customer). Contacts can live below the company record.

Here you will see all the activity of the contacts for the company. A contact does not require a company, however at some point in the sales cycle you may convert a company into a customer in the accounting system, for quotes and sales orders.

White Paper

CohesiveCRM™ Features

- * Quickly enter contact information.
- * Import contact data from trade shows, lists, and other sources.
- * Stay in one place for all related functions. Screenshots above show home base where you have access to sales, service, and accounting.
- * Screens are easy to customize for specific requirements. Fields can be quickly added to database and made available for reporting. Customize workflow for lead and quote cycles.
- * Opportunity and pipeline management including reports and dashboard.
- * Automatically notify contact or sales manager via email or on-screen alerts.
- * Automates customer lifecycle starting with interested lead, to a qualified prospect, to a customer, and to the sales order. Overlooks the servicing of the customer and guiding customer to re-purchase.
- * Rule based alert system. Rules for when to alert sales manager or contact and what to send as alert. For example, email sales manager if contact misses follow up date or quote is over due for a response from prospect.
- * Allows salespeople to take orders quickly with important information available at a touch, such as sales and service history, credit limit, trends.
- * Handling of partner relations management.
- * Forecast and trends reporting. All reports use Crystal Reports and can be changed by any one familiar with Crystal Reports Designer.
- * Territory management. Sales people may have a regional sales manager for sales tracking.
- * Many searchable options are available for finding company and contact records.
- * Option available for using remote devices such as PDA's.
- * Option available for Website interface. Collect data via web. Make information available to the web for the sales person or client.
- * Option available for managing collections.
- * Option for stand-alone licenses which do not use Sage Mas 90 or Sage Mas 200 license. Run CohesiveCRM on a laptop and sync data with corporate office.