

# Customer Service & Sales

Maximize sales and profitability through flexible, customer-centered service and sales. Apprise® Customer Service and Sales includes extensive tools and customizable capabilities to help you effectively manage and optimize each customer relationship. Utilize customer specific rules for creating and managing contracts, credit, collections, pricing, discounting, and invoicing to meet the unique requirements of each customer.

## Flexibility to meet customer needs

The Apprise® ERP rule-based environment gives you the flexibility to meet the specific requirements of customers and prospects. Our solution allows you to establish customer specific pricing or assign price book, class, region or family pricing. You also gain the flexibility to define customer-level credit and collection terms. Add customer orders — all with the same business rules — whether they are received by phone, online or via EDI. Offer a full array of customer payment terms and options — from cash-on-delivery to credit, financing, and net payment terms. Meet the requirements of large mass merchants and other retail customers through flexible, integrated EDI options for orders, shipment and payment information. Provide real-time order status, and enable dynamic proof of delivery with integrated e-mail capabilities.

## Increased sales and revenues

Manage customer contracts and gain real-time access to customer terms to help your sales and support teams maximize revenue potential. Utilize integrated customer messaging to streamline sales processes and auto mate customer activity confirmations. Gain sales efficiencies and reduce sale-to-revenue cycle time with broad order and invoice management capabilities. Apply robust information systems to gain insights into sales representative performance and to identify and implement performance improvement initiatives.

## Improved control over customer profitability

Enhance customer and product profitability by utilizing integrated order management that enforces your pricing and margin rules. Create a tighter linkage between sales and business performance by associating commissions to billed or collected revenues, order pricing or profits. Provide appropriate customer discounts based on multiple levels and types of rule-defined price breaks. Cover costs and maximize revenues by automatically applying fees for freight, late payments, returns, and more with a broad range of additional charge management tools. Leverage extensive information systems for an in-depth view into customer profitability performance.

Our comprehensive order and invoice management features give you the tools you need to service your accounts for maximum profitability.

# Apprise® Customer Service and Sales

## Customer Service

- > **Customer specific rule-based environment** — maximum flexibility and control
- > **Full customer visibility** — real-time access to customer information, history and more
- > **Integrated contracts** — view and manage contracts in real time
- > **Extensive customer notes, remarks and alerts** — flexible access to customer specific information
- > **Customer inquiries** — dynamic access to detailed customer history, order status, proof of delivery status, inventory availability and status, returns management and more
- > **Credit and collections terms and management** — develop rules unique to each customer
- > **Payment terms and options** — maximize sales opportunities and receivables
- > **Price books, classes, regions, and families** — gain deep customer specific pricing flexibility
- > **Discounting** — control margins with multiple levels and types of price breaks
- > **Additional charge management** — cover costs with automated application of special charges based on your business rules
- > **Integrated customer messaging and communications** — automated customer activity confirmation
- > **Comprehensive information systems** — dynamic access and drill-down tools for improved insight and management control

## Sales

- > **Sales representative and team management** — effectively manage quotas, commissions and territories
- > **Prospect, customer and contact management** — efficiently create and centrally manage comprehensive customer profiles and data
- > **Images and documents** — access product pictures, specification sheets and more
- > **Order management** — quotes to orders; copy a previous order; enter, hold, release and void orders; manage returns; inventory visibility and status; reserve or restrict inventory
- > **Flexible order entry** — seamlessly add customer orders taken from the internet, spreadsheets, EDI or by phone — all utilizing the same business rules
- > **Order pads** — efficiently enter orders for multiple items and styles
- > **Substitute and complementary products** — flexible tools to improve efficiencies in the selling and ordering process
- > **Integrated EDI management** — flexible options to help you meet requirements for ordering, invoicing, payment, POS, shipping and more
- > **Royalties** — track and pay suppliers by product or class, based on sales revenues or profits
- > **Commissions** — associate payment to revenue or profitability for improved control
- > **Sales taxes** — accurately manage tax jurisdictions and rates
- > **Invoice management** — create, print, send, apply and post paper or EDI-based invoices



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