



PowerPM-CRM

Customer Relationship - Contact Management



From CLI - the Time & Billing Specialists

- **Unlimited Contacts** — any number of contacts can be assigned to either a client or a project. A client may be defined as a Prospect - allowing use of contacts for marketing purposes with no impact on time and billing system. Contacts may be attached to multiple clients with cross reference.
- **Instant availability of financial details** — history of billings, work, work-in-process. Status of tax and other date sensitive tasks. Balances of A/R, WIP, Retainer, Open Progress Bills and current Exposure.
- **Unlimited notes for clients and projects**— automatic time and user stamps.
- **Data access control** — give individual users update or display only rights. Limit managers to information pertaining to their clients.
- **Send an email** by clicking the email address.
- **User defined labels** — for phone numbers (up to 6) and management groups (up to 5).
- **Launch a client/prospect web site** with a single click.

PowerPM Client Update

Modify Selection by: Client ID Office selection: All Offices Quit

Add 11000/- The Quintown Bank/Main Account

Client Project 12 Month History A/R Ledger Task Inquiry Incomplete Tasks

Active Contacts... Notes... Date

Name: The Quintown Bank Office: CPA - Moore & Profitt P.C. Start: 05/19/1989

Address: 123 Lostcacha Road Group: BANKS - Banks and Financial Institutes Inactivate:

Address: P.O. Box 6789 Partner: CLI - Charles L. Ingersoll Reactivate:

City: Anytown State: AA Zip: 12345-6789 Manager: MNM - Marion N. McNulty Fed ID: 17-1238641

Country: USA Alpha Sort: QUIN Tx Prep: JFE - James F. Edwards Year End: 6 - June

Contact: Milton Mighzer Title: President Ext. Date:

Salutation: Mr. Mighzer Referred By: Paul Coleman Budget Amount: 120,000

Email: mmighzer@qbank.com Source: 1 - Staff Max. Exposure: 60,000

WebSite: www.qbank.com Finance Change: Yes

Office: 123-456-4123 Ext:

Direct: 123-456-1567 Ext:

Cell: 123-456-9876 Ext:

Fax: 123-332-2299 Ext:

Home: Ext:

Codes SIC: 12345 DUNS: 1298776

Type: 2 - Corporation Selection: NP

Work: 1 - Audit

Sales: 6 - 1,000,000 - 2,000,000

Size: 5 - Over 100

C - Christmas Card List
N - Marketing Newsletter
P - Partner - special client
S - Special Mailing List

Price: Included with PowerPM

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