IRIS Exchequer Easy CRM – Full sales and marketing functionality for up to 10 users

IRIS Exchequer Easy CRM is the ideal solution for organisations looking for full sales and marketing functionality for up to ten users, giving you the power to share intelligent information on potential and existing customers across the business.

Quick and easy to integrate with your existing IRIS Exchequer accounting and business solution, IRIS Exchequer Easy CRM is easily configurable to any type or size of business.

IRIS Exchequer Easy CRM is also fully scalable, so you can always add extra functionality and users later on.

Key features

- **Get more from your existing customers:** Gain a better understanding of your customers and their future needs with a centralised database of historical contact information.

- **Open up more information from your IRIS Exchequer Financials:** Share product, pricing, and full historic sales information for each customer with your marketing, sales & mobile sales staff.

- **Improve the efficiency of your sales and marketing staff:** Increase your productivity by using a single system to manage your sales forecasts and appointment booking.

- **Increase your marketing campaign effectiveness:** Ensure you're targeting the right people for a greater return on your campaign investment. Use CRM reporting and intelligence tools to view KPIs, such as real-time lead conversion rates.

- **Get more, for less:** Increase automation through your CRM system and manage your customer/ prospect contacts with greater ease and efficiency.

Manage your sales cycle from start to finish IRIS Exchequer Easy CRM captures data on every interaction with all of your contacts, as well as providing powerful and intelligent interrogation functionality with dynamic management reporting.

It provides campaign, pipeline and sales lead management and insight into how budgets are being spent, giving an insight into results on a 'cost per lead' basis.

Information at your fingertips

From notes and contact details to quotes and opportunities – all your staff will share a single, unified view of the customer. Actions can be scheduled and automatically emailed to users who will be taken straight to the customer record to address any outstanding issues or opportunities – providing staff with instant access to key information at all times.

Generate optimum return

IRIS Exchequer Easy CRM enables your marketing budgets to work harder by providing insight into which campaigns bring the best business return on investment. Interrogate campaigns on a cost per lead basis and ensure marketing activities are focused on those that generate the best return.

Effectively manage every sales opportunity

IRIS Exchequer Easy CRM captures every detail of the sales process, recording specific product type, new or repeat business, sales value, timescale and marketing source. Triggers and alerts can also be set to ensure no opportunities are overlooked.

Generate quotes effortlessly IRIS Exchequer Easy CRM takes data directly from the accounts to produce quotes which can then be formatted in Microsoft Word, Excel or Adobe PDF document templates.

All staff, whether office based or remote workers, can access critical information on product, pricing and discounts.

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Modules

- Contact Manager B2B
- Document Manager
- Campaign Manager
- Products & Pricing
- Quotation Engine
- Sales History
- Sales Lead Tracker
- Sales Ledger Integration
- Sales Order Processing
- Screen Customiser
- XML API

Key features

- Powerful reporting and business intelligence of your sales, marketing and customer services
- Dynamic integration with Microsoft Office giving full document management
- Rapid data entry, releasing time and effort to focus on the customer
- Integration with IRIS Exchequer, with the ability to raise quotations, orders and invoices
- Campaign, pipeline and sales lead management

Empower your organisation and get the most out of your sales team, reduce your costs and boost your revenue with IRIS Exchequer Easy CRM.

Looking for a larger CRM solution?

If your business requires a larger CRM system for over 10 users, then IRIS Exchequer CRM (Professional version) is the perfect solution. IRIS Exchequer CRM provides a fully comprehensive suite of tools that combine and utilise all of your organisation's knowledge, information and expertise, saving you even more time and maximising selling opportunities.

From customer service, marketing, sales, support and finance, your teams will have instant access to powerful, accurate information that will enable them to better meet the needs of customers and prospects. Additional modules available with IRIS Exchequer CRM Professional version include Contact Manager B2C, Telephony Integration, Telesales, Inventory Manager, Service Contracts and much more.

For more information, please contact your Client Development Manager, call **0844 815 5594** or email **exchequer@irisenterprise.co.uk**

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