SharePoint CRM Solution

PointSolutions

SharePoint CollaborationAppsServices

In partnership with LookOut Software, Inc.

harepoint CRM TEMPLATE

A Flexible CRM

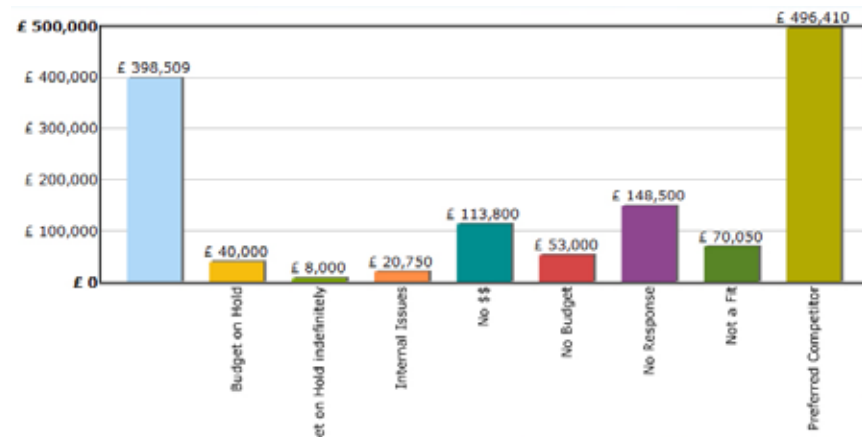SharePoint based CRM is a flexible, easy-to-use and adaptable CRM application.

SharePoint CRM takes advantage of Native SharePoint functionality while providing a rich and comprehensive feature set that can be enhanced further by adding a number of module based functionalities including HR features and Outlook integration.

An Integrated CRM

Many of our customers experience the value of having their core business process systems, such as CRM, as part of the wider SharePoint environment. From a commercial consideration and integration point, the business benefits are demonstrable, so making a case for SharePoint CRM becomes easy.
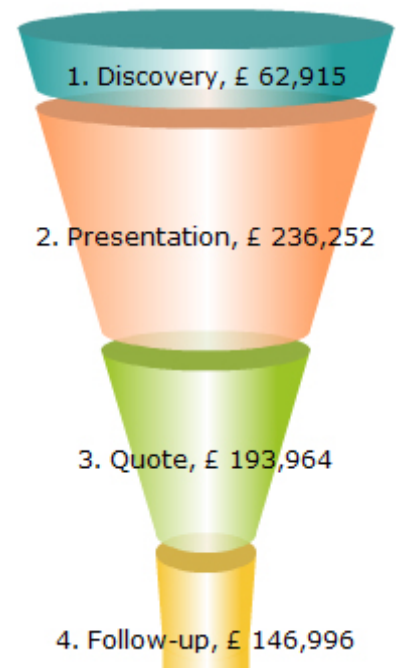
"

Medilink engaged PointSolutions to create a new CRM system based on Microsoft SharePoint, after spending over six months searching for a solution that suited our particular information management needs.

"

Jason Brannan
Medilink

Management Dashboards

Lost and Abandoned Opportunities

Current Stage of Opps this Year

1. Discovery, £ 62,915

2. Presentation, £ 236,252

3. Quote, £ 193,964

4. Follow-up, £ 146,996

Simple Adaptable Powerful

Our CRM solution has been designed to be easy to use and can be branded to reflect your business and tailored to meet your business needs. As a standard our CRM solution comes with over 125 'do-it-yourself' customisable features and can be extended further, should the out-of-the-box capabilities fall short of your requirements.

Our CRM solution is installed behind your firewalls and your security infrastructure, but is accessed via an internet browser on PC, mobile or tablet and so provides visibility for staff in the office and on the go.

"

Having worked with PointSolutions on implementing SharePoint for Panache worldwide, it became apparent that we needed a solid CRM system to complement our existing back office suite of software, we decided to leverage our investment in SharePoint and find a system that would sit inside SharePoint, and the PointSolutions system was perfect for us.

"

Stuart Knipe
Panache Lingerie

Key Features

- OOTB implementation

- Outlook CRM Plug-in for SharePoint provides seamless email integration

- Built-in configurator to personalise SharePoint CRM to your business

- Manage all aspects of your lead, opportunity & account processes

- Tracks all interactions & relationship details for customers and prospects

- Secure, so you maintain control of your sensitive customer data

- Updates and ongoing new feature releases are available 2-4 times a year

- Can be enhanced with SharePoint Holiday Management, Expenses Management and Timesheet Management modules

- OOTB dashboards

- Bespoke business functionality can be added including BI reporting

- Technical support included

- Scalable in-line with your evolving business

Implementation Packs

PointSolutions provide flexible implementation options which cover the following areas:

- Consultancy

- System Integration

- System Configuration

- Data Migration

- Workflow Creation

- Security Configuration

- Dashboard Design

- Training

Support Credits

PointSolutions offer a number of credit based support packages to help businesses maximise and extend the SharePoint environment. Our packages allow you to call off credits /time to contribute towards enhancing the systems we have helped you deploy.

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