



OpenBOX Business Suite | **OpenBOX** Technologies

OpenBOX Business Suite offers the most flexible, affordable business solutions that adapt to an organization's changing needs.

Organizations use OpenBOX Business Suite to streamline and manage customer information, enabling them to have one consistent view of customer data for better relationships, greater operational efficiency and increased profitability.

CRM and Expanded Enterprise Solutions

OpenBOX Business Suite contains modules that address current and expanding needs including Sales Force Automation, Customer HelpDesk, Marketing Campaign Management, Order Management, Project Management and Partner Management.

Whether purchased together or separately, OpenBOX modules are fully customized to adapt to an organization's business processes and can integrate with front- and back-office applications including accounting and ERP packages via its API. Whether it's an out-of-the box application such as the modules above or a customized module, OpenBOX Business Suite addresses the needs of both small to mid-sized businesses and larger enterprises.

Common features among all modules

End to end CRM

All OpenBOX modules are fully integrated and can be added as needed.

Available hosted or as in-house solution

OpenBOX Business Suite is available as either a hosted application or as an in-house turnkey solution. The choice is yours. Customers can begin with the hosted option and then bring it in-house when ready.

Customizable

OpenBOX Business Suite contains powerful customization tools for use not just upon deployment but as your business needs evolve. Easily and effortlessly add tables and fields, use drag and drop form designer to create and modify forms, and much more.

Workflow builder

OpenBOX contains a workflow builder to match an organization's business processes. Each step in the workflow stream can bring up a customized form. Access to the forms and fields is based on the user's security settings.

Fully integrated

OpenBOX offers COM-based interfaces to its object model to facilitate easy integration with other front- and back-office applications. Integrate OpenBOX Business Suite with an existing CRM, accounting, inventory management or ERP package.

Report and queries

All OpenBOX modules include a set of pre-configured reports for analysis and tracking. Users can easily create their own reports, which come in different formats including text-based and colorful charts. Queries can be built and saved as sub-menu items on the user's dashboard for instant access.

Fast deployment

With its strong architecture and customization tools, the OpenBOX Business Suite can be up and running in days. Customers work jointly with OpenBOX Professional Services to reduce implementation costs.

Security

Contains multi-level security settings at the group, user, form, field record and command levels. Users log in to a SSL-supported web portal with an ID and password.

To protect customer data, OpenBOX utilizes a certificate server with 128-bit encryption, database high availability clustering and redundant, multi-location data storage.

Web-based, easily accessible

OpenBOX SFA is completely web-based and easily accessible using a log-in ID and password. All that is needed is a web browser.

Lowest total cost of ownership, highest return on investment

OpenBOX Professional Services will work with customers to leverage existing processes, resources and applications and design the right CRM solution or applications to fit an organization's needs. Through Professional Services, customers are able to keep implementation costs down resulting in low total cost of ownership and highest return on investment.

Customer support

We recognize the importance of a service and support organization that is responsive to your needs. Our support professionals communicate and collaborate to serve our customers' needs in answering technical and set-up questions and general inquiries. To ensure your success we work as a team and draw from a collective knowledge and expertise base to deliver service and support solutions in a professional, timely manner.

"I evaluated Salesforce.com and found it couldn't provide the level of customization we needed. OpenBOX CRM was flexible enough to adapt to our current business process and allows me to make changes as often as needed. As a result, our organization operates more efficiently and is able to offer the best personalized service to our customers."

Joshua A. Carpenter, Vice President Investments, ICG Financial

OpenBOX Business Suite

CRM Solutions

- Sales Force Automation
 - √ Sales Management
 - √ Opportunity Management
 - √ Activity Management
 - √ Contact Management
 - √ Lead Management
 - √ Quote Management
 - √ Reports and Queries
 - √ Territory Management
 - √ Sales Tools
- Customer Help Desk
 - √ Multi-Channel Contact Center
 - √ Knowledge Base
 - √ Web-based Self Help
 - √ Call Tracking
 - √ Defect Tracking
 - √ Asset Management
 - √ Contract Management
 - √ Reporting
- Marketing Campaign Management
 - √ Multi-Channel/Multi-Stage Campaigns
 - √ Campaign Tracking and ROI Reporting
 - √ Segmentation and Targeting
 - √ List Management
 - √ Real-time Statistics

Expanded Enterprise Solutions

- Order Management
 - √ Automated Order Processing
 - √ Real-time Order Status
 - √ Integration with Front and Back-Office Applications
- Project Management
 - √ On-line Collaboration
 - √ Performance Tracking
 - √ Reports and Queries
 - √ Task Management
- Partner Management
 - √ Web-based Partner Portal
 - √ Real-time Information Sharing
 - √ Knowledge Base
 - √ Reports and Queries

Professional Services

- Needs Analysis
- Design
- Implementation
- Training