



Sales Force Automation | OpenBOX Business Suite

OpenBOX Sales Force Automation is the most flexible solution that automates the sales process from lead to sale and beyond enabling sales teams to be more productive and focus on establishing, managing and strengthening relationships with customers.

OpenBOX Sales Force Automation (SFA) contains powerful features that have helped sales reps close more deals, forecast more accurately and identify new business opportunities.

Contact management

All information associated with Accounts, including contacts, notes, and activities, is available in one place. Access to real-time data promotes effective, consistent communication within the organization and ultimately with customers.

Lead management

Leads are captured and kept in a separate table from customers until sold and can be imported from a file, manually entered or automatically submitted via a web form. Leads can be automatically forwarded to sales reps based on territory rules.

Opportunity management and forecasting

OpenBOX SFA manages and tracks all opportunities and related activities on one screen for easy access. Comprehensive reports and queries allow management and reps to know where leads are in the sales funnel at all times. Easily and quickly create forecasts to ensure opportunities are in line with sales objectives and to identify future opportunities.

Activity management

Integration with MS Outlook provides one central calendar and activity schedule. Reps can schedule activities and set reminders or e-mail alerts. Notes that are typed within activities are searchable. A configured workflow drives activities, automatically sending notifications if activities are missed.

Territory management

Easily create, administer and analyze territories. Assign territories based on specified data such as product, city, state, or zip code. Leads can be automatically forwarded to reps based on this criteria.

Defined workflow and business rules

OpenBOX SFA provides the flexibility to define your workflow for a smooth, consistent sales process that helps reps move leads from one phase of the sales cycle to another. Specific business rules can be set up to automatically notify reps or managers of missed activities or important deadlines.

Sales productivity tools

OpenBOX SFA contains a document library for the latest marketing literature, quote forms and templates for sales reps to utilize throughout the sales process, maintaining a consistent, professional image and always having the right tools on hand to close a sale.

Reports and queries

OpenBOX SFA includes several pre-configured queries and reports for analysis and tracking. Creating and generating queries and reports is easy and requires no IT support. Reports and queries can be generated and saved as gadgets or submenu items for instant access. Various types of reports can be generated in text format or colorful bar and pie charts.

Customization

As with all OpenBOX products, SFA contains powerful customization features that allow users to personalize dashboards and gadgets based on preferences, viewing only the information they need when they need it.

Administration

Intuitive administration tools allow admins to create and modify tables, build forms and user interfaces, set and control field attributes, call external web pages into the OpenBOX application and much more. Multi-level security settings can be set at the group, user, form, field, record and command levels.

Seamless integration

Built to adapt to existing business processes and applications, the OpenBOX SFA architecture enables seamless integration with back-office accounting and ERP systems for a true end-to-end CRM solution.

Wireless access

Take OpenBOX SFA on the road. With OpenBOX mobile SFA, sales reps can get up to the minute information using a Palm handheld or a WAP enabled cell phone. Critical information is accessible anywhere, anytime. Sales reps can work on laptops while on the road and later connect to the server and synchronize information.

Up and running in days not months

With its strong architecture and customization tools, OpenBOX SFA can be up and running in days. Customers can work with our Professional Services group to reduce implementation costs.

Available hosted or turnkey

OpenBOX SFA is available either hosted (ASP) or as an in-house, turnkey solution. Start with the hosted solution today and bring it in-house when needed. The choice is yours.

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.

Part of a complete CRM solution

Integrate Sales Force Automation with Marketing Campaign Management, Customer HelpDesk, Order Management, Project Management, and Partner Management for a complete, enterprise-wide CRM solution.

Experience Low TCO, High ROI with OpenBOX

OpenBOX Professional Services will work with customers to leverage existing processes, resources and applications and design the right CRM solution or applications to fit the 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.

“The OpenBOX Sales Force Automation and Order Management System has streamlined and organized my business information for one consistent view of customers. My organization operates more efficiently allowing more time to focus on satisfying customer needs.”

Jeff Swider *President, Vision Telecom, Inc.*

System requirements

Supported Databases: Oracle, SQL Server, Sybase

Supported Operating Systems: Windows XP, 2000, NT, 2003

Minimum Client Specifications: 800 x 600 screen resolution, Microsoft Internet Explorer 5.5 or greater or Netscape 7.1, and a connection speed of 56K or greater

Data security, availability and reliability for ASP users:

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