Part Number 862103 - Aegis Client Management

Aegis Client Management is a client, sales and opportunity pipeline management system. This product suite maximizes your staffing resources by providing a shared repository of opportunity pipelines and qualified leads. Features such as broadcast messaging make it possible to keep customers informed of product updates, fixes and new releases conveniently.

FULL CLIENT MANAGEMENT SYSTEM

Aegis Client Management helps you to manage client relationships and information effectively. Customer and sales information are easily retrieved to manage prospected opportunities, and to ensure valuable marketing resources are expended optimally. This product suite maximizes your staffing resources by providing a shared repository of opportunity pipelines and qualified leads.

In product- or service-oriented companies Aegis Client Management is also used to manage communication with existing clients. This product suite provides announcement and broad audience notification facilities to ensure clients are notified of upcoming product releases, product fixes and offerings consistently and in a timely manner.

FEATURE DESCRIPTION

CENTRALIZED CLIENT INFORMATION
Aegis Client Management offers you the option to create an unlimited number of contacts for each client. The storage and integrated view of client information enables you to create many functional views of the information.

- Easily generate phone list, mailing list, e-mail list, contact list and any other list from your client database.
- Record client activities/correspondences.
- Record client feedback.
- Create Client invoices and quotations. Automatically convert a quote to an invoice.
- Record offers made to clients.
- Record products purchased by clients.
- Record sales opportunities.

For more information

Contact Sales:
U.S. and Canada
Call: 1.973.796.5201
E-mail: sales@nyfederal.com

www.nyfederal.com

BROADCAST MESSAGE
Broadcast messages via e-mail to your clients or internal users. You can also merge data from your database to create a personalized message. You can also include attachments in the e-mail.

- Quickly and easily notify your clients via e-mail of new products or fixes for your existing products without the time consuming task of sending out letters.
- Broadcast message to clients on a special offer.

INCIDENT FILTERS, VIEWS, SORT FIELDS AND CELL STYLES
Use filters, views and sort fields to show you the records you want to see in the form you need to see it in.

- Filters are a powerful facility that allows you to do exactly that – a filtering of database information to view selected records only. As you add records and your database becomes bigger, it becomes more difficult to locate the records you are interested in. For example, you may want to look at only calls that have not been allocated to the development teams for resolution, or enhancements requested by your clients, or all clients in a given country.
- Filters can also be used in reports, graphs, import, export, broadcast message and mail merge operation.
- Views allow you to select specific fields to be displayed on the grid on the main window. You can also attach a filter, sort fields and cell style to a view.
- User defined sort fields allow you to sort your records by more than one field. For example, you can sort your records by Reference # in ascending order, followed by Status in descending order and Call Type in ascending

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order.

- Cell style allows you to highlight records based on the value of a field. For example, if Priority is Low, set the color to green, if High, set it to red.
- Network ready for multi-user environment

CUSTOMIZED FORM DESIGNER

Use the program as supplied or change it to work your way. Set up your own databases, the way you want them. Change your view of information, define field names and attributes, attach a list box to a field and use the form designer to design your own window – you name it. Each field is fully configurable.

- Form designer. Hide fields you don't need, move fields around by dragging and dropping them to a new position and specifying the tab order of each fields.
- Configurable field properties let you define field names, compulsory fields, attach list boxes (look up) to fields and provide default values.
- Incident and asset number can be generated or user defined. If you select to have the reference number generated, you can specify the parts that make up the reference number to suite your needs.

OPTIONAL ADD-ON MODULES

The following optional add-ons are available for Aegis Client Management.

- System Alerts

AND MUCH MORE…

- Interface to external e-mail systems
- FAQ
- Full security control
- Record templates, auto complete and populate options for quick and accurate data entry
- Unlimited number of databases
- Data import and export
- Group update and delete
- Create unlimited user groups
- Full security control
- Option to change colors used for grid, headings, scroll buttons, compulsory fields, list bars, contact fields and more
- Option to change field names, hide and rename folders
- Option to create list boxes and list box values, and add these list boxes to almost any field
- Mail merge with Word documents
- Define your own list boxes and values (lookups)
- Product inventory
- Track competitors

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- Record staff's internal and external charge rates for costing
- Reminders to remind you of due dates or other important dates

SPECIFICATIONS

CLIENT
- Pentium II or higher with 32 MB memory and 50 MB disk space.
- Windows™ 95/98/Me or Windows™ XP/2000/NT 4.0 (with Service Pack 5 or higher)

SERVER
- Pentium II or higher with 32 MB memory and 50 MB disk space.
- Pentium II or higher with 128 MB memory and 100 MB disk space.
- Windows™ 95/98/Me or Windows™ XP/2000/NT Workstation, Windows™ 2000/NT Server 4.0 or higher (recommended).

DATABASES
- MS SQL Server or Access

WEB FRONT END (if used)
- Pentium II or higher with 256 MB memory and 100 MB disk space, plus room for your data. 20 MB total disk space for moderately sized database is reasonable.
- Windows NT 4 (Workstation or Server) with Service Pack 6a or Windows 2000 (Professional, Server or Advanced Server) with the latest Windows service pack and critical updates available from the Microsoft Security Web site or Windows XP (Home or Professional)
- Internet Information Services (IIS) Version 5.0 or later on the web server.
- Internet Explorer 5.01 or later on the web server and on each client PC.

ORDERING INFORMATION

P/N 862103 Aegis Client Management

Add-On Module Options (priced per server)
- P/N 862174 System Alerts

Other Options
- Dedicated License