PROMYS™

Fully integrated, end-to-end business management

End-to-end business management

Industry-specific

Process-centric

Integrated

Scalable

DRIVE LABOR UTILIZATION

IMPROVE BOTTOM LINE

KNOW TRUE PROFIT

PROMYS unites diverse departments and provides a 360-degree view of the client

PROMYS is complete business management for organizations that sell, implement and support solutions involving serialized inventory.

PROMYS is a Web-enabled, fully-integrated CRM/ERP/service management suite that automates and streamlines business processes, from early sales lead to post-sale service support. PROMYS unites diverse departments and provides a 360-degree view of the client, thus maximizing the value of each and every customer interaction. The process-centric design and logical workflow alleviate the burden of administration and help organizations focus on what is really important: their core business.

Provide a higher level of customer service. *Improve* internal business processes. *Improve* the bottom line. Ultimately, **gain** *a competitive* advantage*.*
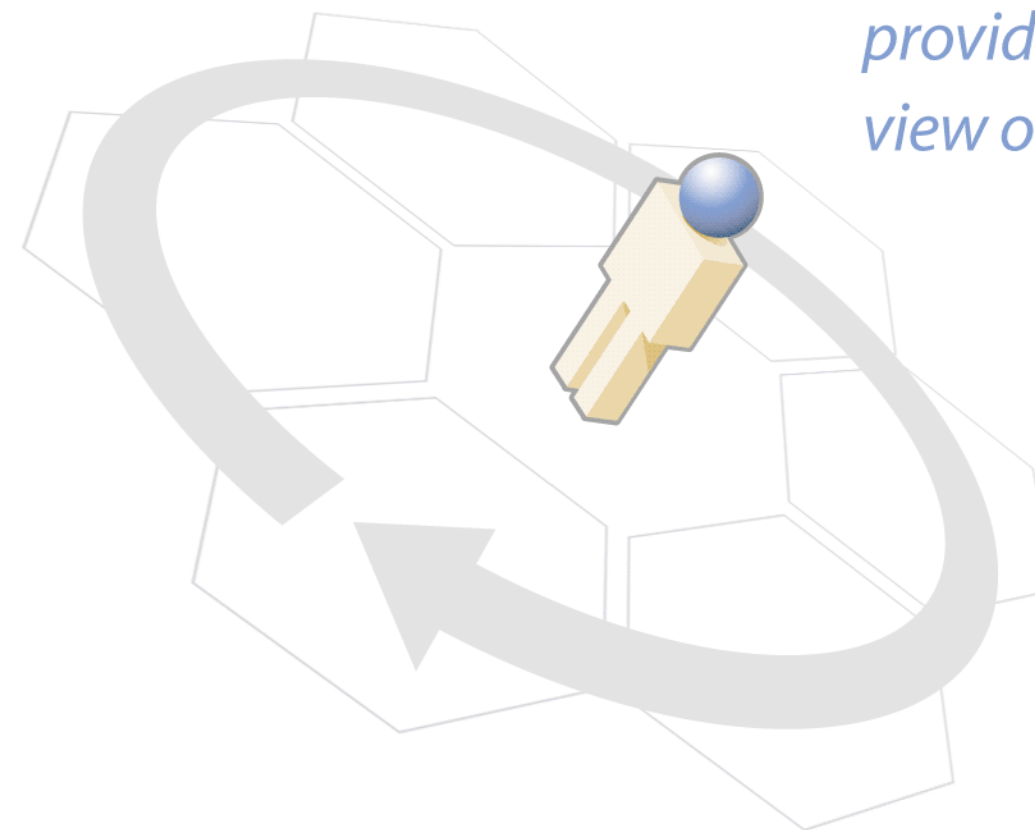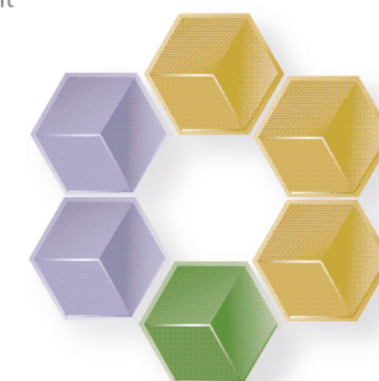
PROMYS replaces homegrown and point solutions, automating three key business processes that encompass the full customer lifecycle: sales force automation (SFA), order management (ERP), and service helpdesk, all connected into a centralized database:

[SFA] SALES FORCE AUTOMATION

[ERP] ORDER ADMINISTRATION

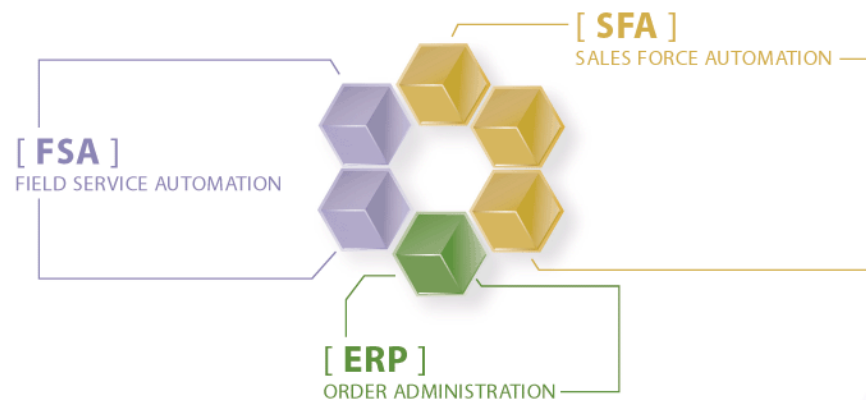**[FSA]** FIELD SERVICE AUTOMATION

Although PROMYS was designed to provide the most value as an end-to-end tool that can integrate with virtually any back office system, it can also be implemented in the following configurations; SFA only, SFA and ERP, FSA only, or the full suite (SFA, ERP and FSA) to match your needs.

PROMYS™
HOSTED INTEGRATED CRM, ERP & HELPDESK SUITE

PROMYS Module legend

[SFA]
SALES FORCE AUTOMATION

[FSA]
FIELD SERVICE AUTOMATION

[ERP]
ORDER ADMINISTRATION

myPROMYS™

FOR CLIENTS, MANUFACTURERS, AND BUSINESS PARTNERS Customers, partners, manufacturers and distributors can gain easy access to what is important to them via the Web, anytime, anywhere. Each portal is customized; you authorize individual rights and privileges.

Empower your customers
The MyPROMYS customer portal serves as a gateway for your customers to access real-time information from your system 24/7. Customers can check inventory, create and track service and project requests, download files and view invoices, all in real-time.
Market differentiation can often depend on the quality of service you deliver to your customers. By offering an online customer portal, you can improve satisfaction while reducing the time your resources spend on non-value activities.

Strengthen your partnerships
The MyPROMYS portal provides your partners, suppliers and manufacturers with access to the important details of your relationship; for example, you can provide them access to the sales pipeline and forecast, and purchase orders. At the touch of a button, they can create and track service call and project requests, anywhere, anytime.

PROMYS CONTACT MANAGEMENT enables organizations to gather comprehensive prospective and existing customer, contact and relationship data and share consistent information across the enterprise, regardless of geographic location. Contact management is the foundation of the PROMYS process-centric system and eliminates data duplication and inconsistency, resulting in improved operational efficiency in all related business units.

PROMYS SERVICE MANAGEMENT helps improve the effectiveness of your service helpdesk, increasing service profitability and customer satisfaction. This highly advanced service helpdesk meets and exceeds leading manufacturers' technical requirements to help achieve specific partner levels and certifications. Detailed labor tracking and Microsoft Outlook synchronized scheduling increase technician and service personnel productivity.

PROMYS RESOURCE MANAGEMENT enables customer service requests to be processed smoothly and efficiently. Labor tracking, analytics and reports give instant insight into what service personnel are doing and when they are doing it, making it easy to determine labor efficiency, utilization percentages and required billing at a click of a button. Real-time project costing and budget analysis alerts you to projects that are not in line with estimates so that you can take corrective action and change the outcome.

CONTACT MANAGEMENT
MARKETING MANAGEMENT
SERVICE HELPDESK MANAGEMENT
CUSTOMER
RESOURCE MANAGEMENT
SALES OPPORTUNITY MANAGEMENT
ORDER MANAGEMENT

PROMYS MARKETING MANAGEMENT leverages the accurate contact and relationship information fundamental to timely and effective marketing initiatives. With PROMYS, determining ROI from marketing initiatives is easy and accurate; link opportunities, sales orders and contact logs to marketing campaigns and specific marketing activities.

PROMYS SALES OPPORTUNITY MANAGEMENT guides the sales team to quickly and effectively translate sales opportunities to quotes to orders by ensuring each step is completed before initiating the next step. PROMYS eliminates manual reporting, automatically generating consistent, accurate sales pipeline, forecast and other sales reports. Automated sales reporting means that time is spent with clients, not struggling with administration and complex SFA systems.

PROMYS ORDER MANAGEMENT provides end-to-end order administration, linking sales orders, purchase orders, packing slips, invoices, credit memos and RMAs. The PROMYS master products list – an electronic catalogue of all products and services – and real-time pricing and availability links to key distributors help optimize the order management process.

> Since implementing PROMYS over three years ago, I've seen a dramatic improvement in the functional areas of the business. Labor utilization has increased by 7%, sales win loss ratio has improved by 9%, but, most importantly, the bottom line has increased by 4%. With comprehensive management reporting, I always have my finger on the pulse of the company.
>
> **John Breakey,
> President and CEO, UNIS LUMIN**

The following pages provide an overview of eight top business challenges,

the *solutions* PROMYS can deliver and *how* PROMYS delivers them

CHALLENGE #1 : IMPROVE CUSTOMER SERVICE

Solution	Features
Stronger customer relationships and more repeat business through more efficient and highly-personalized sales, fulfillment and service processes. Service calls and requests processed quickly and systematically, resulting in superior customer service and, ultimately, customer satisfaction. Empowered customers with self-serve access to their account information, anytime, anywhere.	• 360-degreet view of the customer – customer interactions from all business processes can be viewed by authorized employees from diverse departments • Advanced service helpdesk with comprehensive support call & trouble ticketing system • Automated email alerts to ensure clients are notified to renew contracts or top up accounts of pre-purchased blocks of labor • MyPROMYS Portal – customized gateway for clients & key stakeholders

CHALLENGE #2 : TRACK PERFORMANCE ACROSS THE FUNCTIONAL AREAS OF YOUR BUSINESS

Solution	Features
Web-enabled, anywhere, anytime access to business information from across the enterprise. Visibility into diverse departments and processes. Power to identify areas of inefficiency and streamline operations through the analysis of labor utilization and performance, and visibility into the sales pipeline, accurate sales forecasting and the analysis of other key sales metrics. Accurate calculation of ROI from marketing campaigns and activities.	• Comprehensive report library – key performance indicators from the sales, project and service processes available anytime, anywhere, via the Web • Graphical management dashboards • Individually customized MyStart Page • Sales reports: pipeline, revenue forecasting and cash flow (30, 60 & 90 days), sales orders, revenue, margin and win/loss opportunities • Labor reports: labor productivity, work in progress and pipeline • Marketing campaign management

CHALLENGE #3 : IMPROVE LABOR UTILIZATION

Solution	Features
Improved understanding of the current demands and future expectations of labor. Superior knowledge of what technical staff is doing and when they're doing it. A simplified scheduling process that optimizes the scheduling of IT service personnel, leading to improved response times and a decrease in operational errors.	• Labor tracking – record of hours technical staff work on specific projects • Tracking of billed time versus lab time, vacation, training, etc. • Labor analysis reports: labor productivity, work in progress and labor pipeline • Multiple assignments (multi-date and multi-resource booking) • Highly-developed request for resource process • Microsoft Outlook integrated scheduling

CHALLENGE #4 : IMPROVE OPERATIONAL EFFICIENCY

Solution	Features
Logical information flow through proven business processes, from sales through to order processing, project scheduling and delivery, and post-implementation support. Improved ease, speed, and accuracy of quotes, sales orders, RMAs, etc. Key information captured in every business process, ensuring complete records for use in related business processes. No more re-keying information to online ordering systems, thus optimizing inventory flow, reducing order entry costs and increasing order fill rates.	• Process-centric design – key information must be captured before the next business step can be completed • Integrated quoting engine • Master products list – electronic catalogue of company products & services • Real-time pricing and availability links to key distributors (Ingram Micro and Tech Data) • End-to-end order administration • Back office integration

CHALLENGE #5 : PREDICT THE FUTURE AND MAKE PREEMPTIVE CHANGES

Solution	Features
Unprecedented business intelligence. Early warning when projects are out of line with estimates and the opportunity to make information-based management decisions that change the outcome. Ability to build on past experience and determine pricing for new projects. Accurate prediction of future cash flow, and short and long-term labor utilization.	• Real-time sales and margin forecasting • Labor pipeline and work in progress reports • Project costing, profitability and budget analysis – detailed record of all costs associated with a specific job or project

CHALLENGE #6 : RAPID EMPLOYEE ADOPTION

Solution	Features
Rapid understanding of functions, fields and buttons and enthusiastic acceptance of the system's logical workflow. Key information captured in every business process, ensuring complete records for use in related business processes. Anytime, anywhere access – office, home, or on the road. Lightning fast navigation.	• Process-centric design • Mandatory fields – data must be inputted before the record can be saved • On-line, integrated iHelp • Hosted service available via the Web 24/7 • On-form embedded links and drop-down menu of related items

CHALLENGE #7 : MINIMIZE RISK

Solution	Features
Minimal up-front capital expenditure that can deliver a faster ROI than traditional software. Rapid deployment and successful implementation so clients, staff, management and stakeholders can realize the benefits sooner. Exceptional service and comprehensive support ensures continued success. No downtime, loss of productivity or cost associated with upgrades.	• Hosted solution – a yearly subscription costs a fraction of purchasing licensed software • Software upgrades managed remotely and updated instantly • Initial setup, configuration, data migration and integration are all possible in a matter of weeks • Proven implementation methodology • The GeNUIT Enterprise Management Center

CHALLENGE #8 : FORM TIGHTER RELATIONSHIPS WITH YOUR CUSTOMERS, PARTNERS, SUPPLIERS AND

Solution	Features
Individualized access to sales, inventory, contract and service agreement data, and product updates, via the Web, anytime, anywhere. Empowered customers and strengthened partnerships.	• MyPROMYS Portal – customized gateway for key stakeholders

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