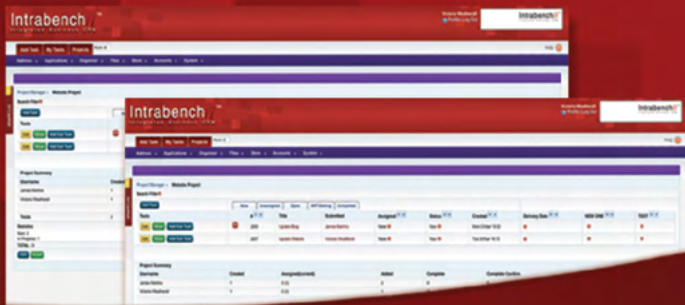


Intrabench// is a complete business management, cloud based system. Versatile, fast and secure allowing you to organise your contacts, drive sales, manage productivity, create marketing and keep accounts all in one place.

Intrabench// has been designed to encompass all business units in one simple to use, off the shelf software package. Your sales leads and contacts seamlessly work with the marketing modules which in turn connect to your accounting system and productivity.



Intrabench//®
Integrated Business CRM

Accounts • Marketing • Sales • Project Management • Campaigns • Invoicing • SMS
Wiki • Calendar • Bulk Email • Opportunities • Quotes • Surveys • Reports

Contact Management

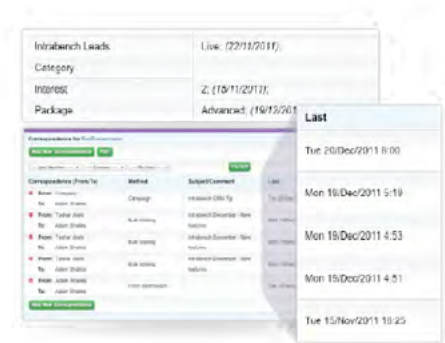


At its core, **Intrabench//** is a contact management system. Every business function is supported, from marketing, sales, opportunities, billing and accounts.

You can categorise your contacts by creating custom fields and group them in any number of ways. You can drill down and search for leads, contacts and opportunities based on strict criteria, short cut searches and bulk email all contacts.

Fast and simple

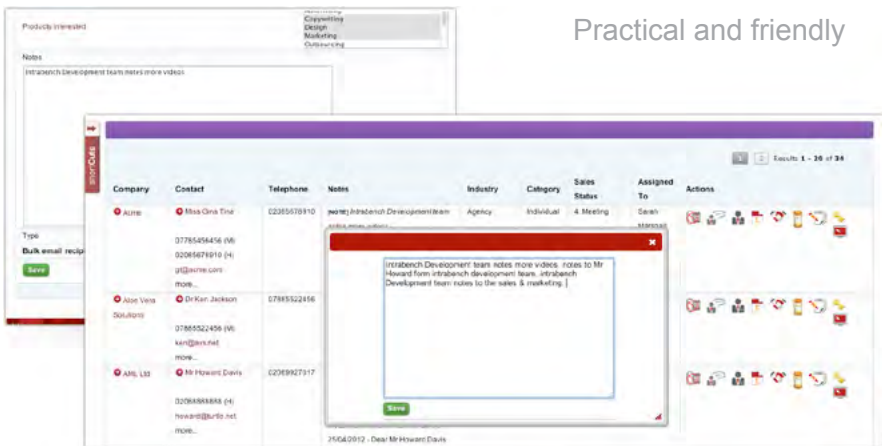
Assign notes, follow up calls to customers, assign contacts and leads to others in your organisation and change the importance of a lead. Call back reminders allow you to chase people up at the time and date you choose with all previous conversations being logged against the customer. All emails from Outlook and Thunderbird are logged under the customer so you know what was said when and by whom.



Correspondence time stamping

All your data in one place

The interface is designed to be fast and user friendly with short cuts to all functions you use with a single click. Created to be simple yet powerful with the user experience in mind. Within **Intrabench//** there is an email system to allow you to send emails to customers and using email templates you can save time in writing repetitive emails.



Practical and friendly

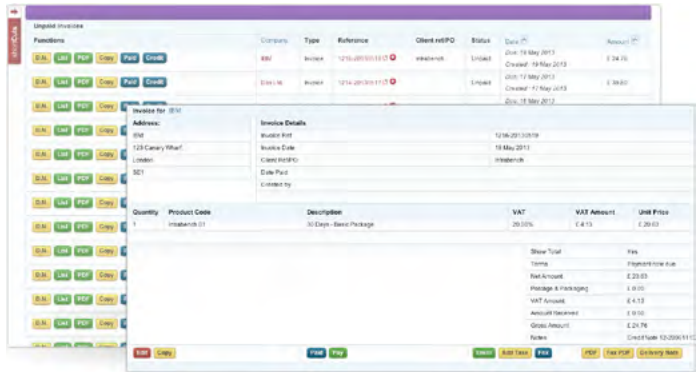
Send emails with ease

Features within the email interface include mail merge, email templating and a reminder to chase the customer. You can attach regular files without having to search your hard drive and **Intrabench//** logs the email under the customers correspondence so you can see who sent what and when.

Accounts / Invoices

At the heart of everything are the finances and **Intrabench//** has a whole host of features for dealing with the entire billing and accounting process. **Intrabench//** can track opportunities through to quotes and in turn links with your product database to automatically populate descriptions, discounts and pricing. Quotes can be turned into invoices or created directly and then emailed straight to the customer. They can then login to your system and pay via card, paypal or simply print out a statement. All invoices have credit terms sending the customers automatic reminders, in effect acting as your credit control department. Payments can be made in advance or on account and additional documents can be created including purchase orders, sales orders, delivery notes and credit notes. Your entire accounts and invoicing platform generates reports to show the most popular products or customers, by sales person and period.

Invoices can be generated automatically each month and sent to customer,s making repeat services much simpler. Payments are also automatically taken either by card or direct debit.



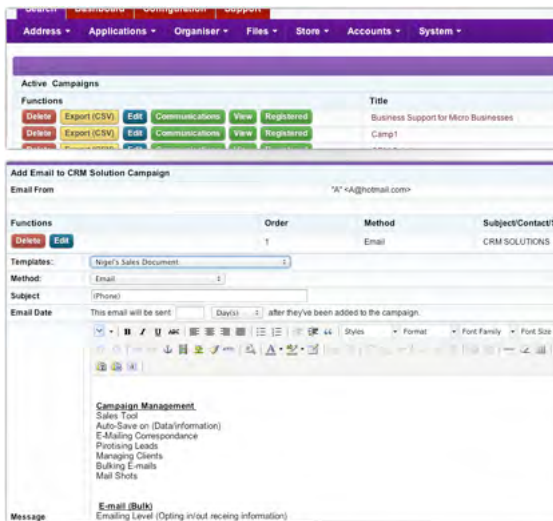
Create invoice with a few clicks

Book keeping and accounting

Intrabench// also has a complete book keeping and pay roll system which allows you to produce VAT returns, management accounts, interim reporting and cash flow accounting. Your accounts or book keepers can login remotely to complete your end of year accounts with PDF pay slips being sent to staff.

Marketing

Marketing is important to all businesses and **Intrabench//** has a set of powerful modules to make life easier when you are trying to promote your product or service. You can search for a group of customers by postcode, products purchased, date contacted or any other grouping or custom field you have created. From this list, you can call, email, post or fax, in bulk with the click of a button. All emails going out are tracked so bounces are automatically unsubscribed, responses come straight back to you and customers can if they want, unsubscribe. You can see which links recipients have clicked on and follow up the most interested customers.



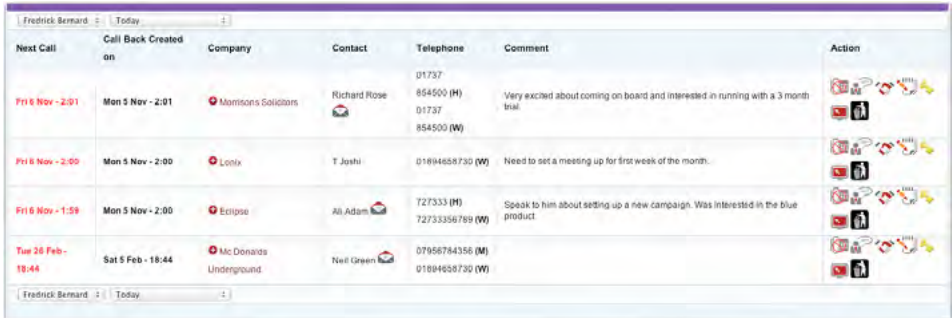
Email auto responder

Intrabench// also has an automatic email responder which will send emails on your behalf to customers automatically. All you do is set the durations between emails and the content and **Intrabench//** will handle the rest. Targetting customers based on their purchase history, stage in the sales lifecycle or any other setting you choose. All emails can be mail merged so the customer gets a personalised email and is more likely to respond.

Integrated with Royal Mail

Intrabench// can also send letters directly without you having to lick a single stamp or fold a piece of paper, the same goes for faxes which are all directly integrated from within **Intrabench//**.

Sales & Sales Automation



Next Call	Call Back Created on	Company	Contact	Telephone	Comment	Action
Fri 6 Nov - 2:01	Mon 5 Nov - 2:01	Marrison Solutions	Richard Rose	01737 854500 (H) 01737 854500 (W)	Very excited about coming on board and interested in running with a 3 month trial.	[Icons]
Fri 6 Nov - 2:00	Mon 5 Nov - 2:00	Leota	T Joshi	01894658730 (W)	Need to set a meeting up for first week of the month.	[Icons]
Fri 6 Nov - 1:59	Mon 5 Nov - 2:00	Eclipse	Ali Adam	7273333 (H) 72733356789 (W)	Speak to him about setting up a new campaign. Was interested in the blue product	[Icons]
Tue 26 Feb - 10:44	Sat 5 Feb - 18:44	Mc Donards Underground	Neil Green	07956784356 (M) 01894658730 (W)		[Icons]

Call backs all in one place

Sales leads can be imported into **Intrabench//** from 3rd parties, add them in manually or use **Intrabench//** Forms for lead capture from your website. The system will show you when you last spoke to a customer, what was said and when you need to call them back. The call back interface will alert you in the morning with the calls you need to make and a simple interface allows you to re-assign and make notes against the calls. Leads can be prioritised, queued or removed as well as finding leads that haven't been contacted in a long time.

Categorising

As you work with **Intrabench//** you'll be able to group your customers and market to them based on this. You can also create work flows so that you know in which part of the sales or order cycle the customer is in and needs to go to. You can protect your fields from staff and restrict access for certain leads.



Add Correspondence for Turtle

Controls | Lists

Date for next contact: 29/06/2013 10:00 [Click on calendar](#)

Assign call back to: Fredrick Bernard

Assign company to: Fredrick Bernard

Comment

Sender/Recipient (Add New): James Troth

Method: PHONE, EMAIL, FAX, POST, SMS/FAC, OTHER

Job number

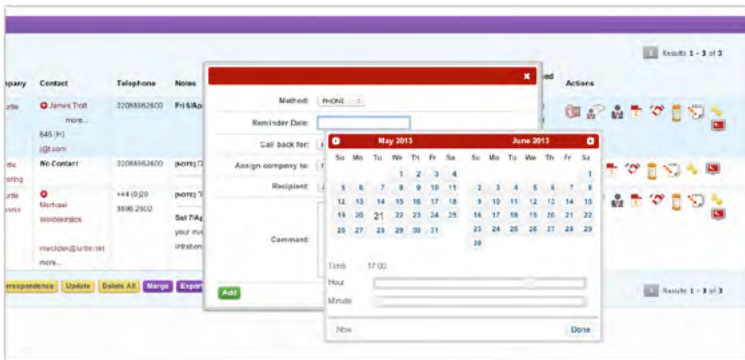
Log as reply: Has a correspondence from contact to you

ADD

Logging notes and creating call backs

Opportunity Tracking

A business that sells multiple times to customers or mainly deals with long terms sales cycles can use the opportunity tracking system whereby you can log a sales opportunity against a customer. Track the amount, likely completion date and also forecast income at the end of the month and quarter. Assign a probability to the opportunity to create accurate sales targets for each staff member. Opportunities link directly in to the quote and invoicing system to calculate amounts, values and turnover. Again you can easily customise the custom fields, values and probability.



All in one screen with shortcuts to each function.

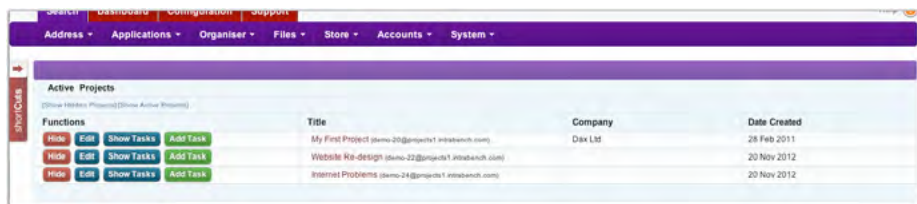
Sales Reports

Reports are an integral feature of **Intrabench//** so you know what you have done and where you are going.

- Total sales, by period, staff member, product group.
- Number of calls made per day/week/month by sales staff.
- Number of emails sent/received by staff member.
- Total value of quotes created and sent.
- Graphs and diagrams.
- Exports and links to Sage Accounting.
- Many more reports and modules.

Project Management

Organise your work load with the **Intrabench//** project manager, allowing you to create multiple work queues or projects. Within each, you can create tasks, set deadlines, assign tasks to staff and estimate time to complete. You can configure the task life cycle so a task can only go from the stages you want as well as creating custom fields linked to tasks. Add notes and files against the task so you can see what has happened at each stage of the process.



Project lists and queues to group multiple tasks

Tasks can have sub tasks within them so you can group similar items and set a total time or manager to the tasks. Each project can have different managers and those managers can perform admin activities on their queue. You can set up criteria for closing a task or changing state as well as who can close a task. Customers can create tasks via email and all updates can be sent to staff as well as customers. Emails are customisable to your branding and emails can be turned off for certain people.

Queues and sub tasks

The screenshot shows a detailed view of a task queue. It displays a list of tasks with columns for ID, Title, Manager, Priority, Status, Assigned To, Due Date, and Time/Estimate. The tasks are color-coded by status: red for 'In QA', yellow for 'In Progress', and green for 'Complete'. The tasks listed are 'May 29th Promo', 'May 29 promo names', 'May 29 promo renewal names', 'May 29 Promo Creative', and 'Support Offertions'.

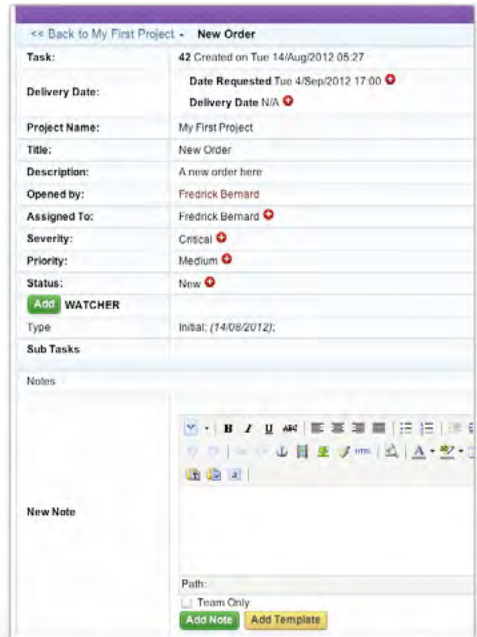
ID	Title	Manager	Priority	Status	Assigned To	Due Date	Time/Estimate
25818	May 29th Promo	Patrick Regale	High	In QA	Jason Furze	Wed 29 May 18:00	Time 67h 30m Estimate 11
21990	May 29 promo names	Timothy Horst	Medium	In QA	Dave Grylls	Wed 29 May 22:00	Wed 29 May 2 362% of estimate Estimate: (8h)
26636	May 29 promo renewal names	Timothy Horst	Medium	In Progress	Dave Grylls	Wed 29 May 22:00	Thu 23 May 2 0% of estimate Estimate: (9h)
25914	May 29 Promo Creative	Timothy Horst	Medium	In QA	Marc Isacoff	Wed 29 May 22:00	Wed 29 May 2 366% of estimate Estimate: (5h)
26354	Support Offertions	Sharon	Medium	In Progress	Marc Isacoff	Wed 29 May 22:00	Wed 29 May 2 444% of estimate

The project manager contains a wide variety of reports so you can see staff productivity, throughput, and assigned tasks. The system isn't stand-alone and you can link an order or invoice to a task and track the delivery or production of every order. Knowing at every stage which orders are in progress.

Customer Support

Run your entire support desk and ticket system from **Intrabench//**. Customers can email in their requests which you can then track and manage using either email or the web interface. Any replies to support tickets will be copied to other staff members as well as status updates sent to the customer. Everything at all stage is logged.

The project manager can be used to change the status, add notes and assign tasks to staff. Reports based on customer, time spent and turn around can be generated which detail productivity and problems. Standard responses can be easily created using templated responses with customers able to login to track their tasks and resolutions.



Customer support ticket

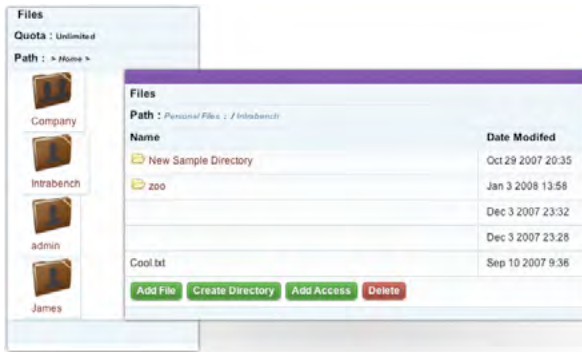
Reports, Productivity and Accountability

Knowing where your resources are going and who is taking them is important in being able to refine your business practices. **Intrabench//** contains vast amounts of reports to achieve this and allows your managers to keep on top of what is happening at the touch of a button. The dashboard shows current workloads, estimated times and tasks likely to go over schedule with everything colour coded so you can see at a glance how things are going.

Reports can be downloaded to Excel and manipulated for reports or exported into PDF for direct printing.

File Management

In the centre of **Intrabench//** is a complete file management system where you can store important files safely in the cloud. Files can be stored under personal folders, a company file area or public whilst knowing files are being backed up safely in the cloud. Files can be emailed to customers, protected and edited remotely wherever you are.



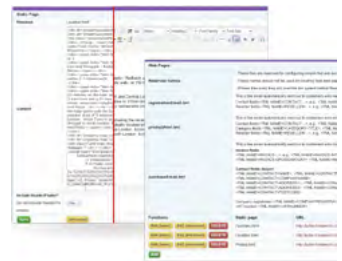
Secure file storage backed up on the cloud and accessible from anywhere

Within your system you can also create custom fields which allow files to be uploaded, for example a field for a customer photo or a signed document. The file management system allows you to work seamlessly with files of all types in a safe and secure way.

Website Content Management

Want to create a simple website? **Intrabench//** allows you to do just that, with an inbuilt web editor with website templates to match. No need to install complex CMS software when **Intrabench//** works out of the box. **Intrabench//**'s simple web editor gives you the power to control the content of your website and change it whenever you want to.

Create pages, add images and links as well as forms and links to your online store.

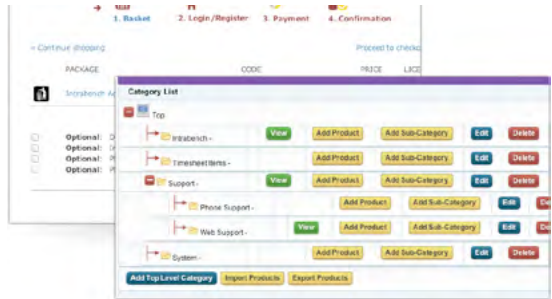


Web editor and page creator

Online Shop

Intrabench// provides a fully integrated shop linked into your back office and CRM system. Maintain one accounts system, fully integrated into your marketing and back office sales.

Keep a list of your products and services within **Intrabench//** to speed up the invoice creation and quotes by simply selecting the items.



Product and services database

In the same way **Intrabench//** will automatically create an online shop for you with these products allowing customers to add to basket and purchase.

Web Forms & Surveys



If you want to create simple and easy to use web based forms, **Intrabench//** has a complete form creation and management system. Forms can look just like your website and be seamlessly integrated in to it. They can contain drop down boxes, multiple select boxes, file uploads, check boxes, text fields, date and time, colours and multi options. Forms can be used for surveys, feedback, contact forms or only used internally for staff.

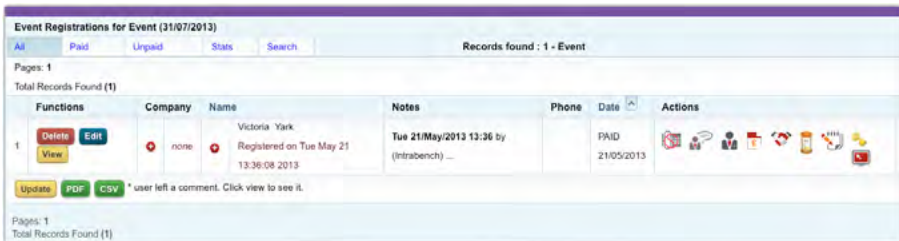
Event Management

A fully integrated event management system allowing you to sell tickets and manage bookings. Create an event, set prices, quantities and deadlines and let **Intrabench** handle the bookings, payments and invoicing. Create custom looking screens and easily manage your bookings using the control panel, which is fully integrated in to the rest of your system. Event forms can contain a multitude of custom fields so you capture the correct details with connection to most payment gateways.



Event management made easy

Statistics and searching

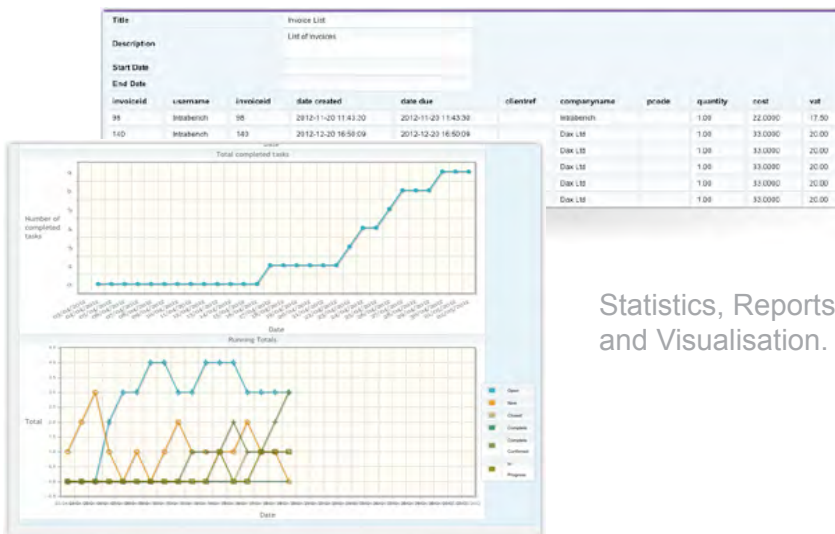


All event functions at the touch of a button

Attendees can be bulk emailed or sent a mass SMS message. Customers who haven't registered can be targetted and participants who have not fully completed the registration can be seen and chased up. Booking lists are created which you can use to tick off people arriving as well as detailed statistics and graphs based on your registration fields. The powerful search criteria allows you to drill down into your bookings, view statistics and target for future and current events.

Reporting

Trends and analysis of your sales and marketing data is key to understanding where your business is and where it's going. Identify opportunities and visualise facts and figures using graphs and spreadsheets. **Intrabench//** gives you the lead on your business intelligence and provides detailed reports on aspects of your business. Identify the biggest sellings products or services, track sales targets, visualise productivity, compare months and forecast turnover and profit. **Intrabench//** has a complete reporting module as well as reports for individual parts of the system.

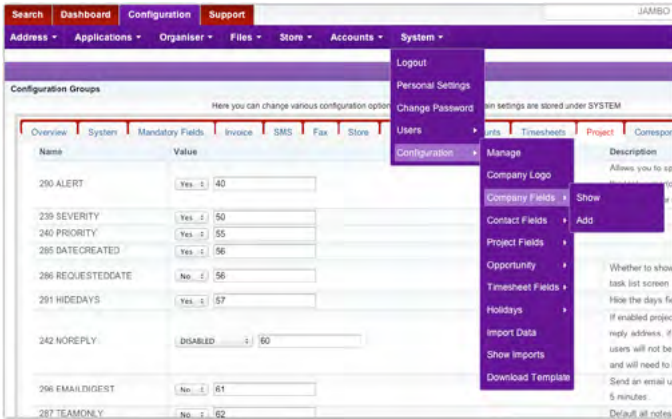


Statistics, Reports and Visualisation.

Calendar and group diary

Manage staff bookings and diaries. Easily identify times when staff are available and those that are busiest. Book meetings and appointments and see in a single screen tasks that need to be achieved in a day. Call backs, reminders, project task deadlines and quote reminders all in one simple screen. Links directly to timesheets and holidays so you can keep track of time off and sick days.

Configuration



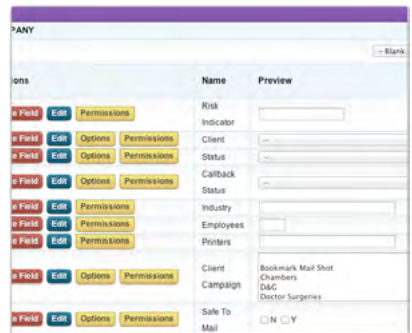
Out of the box **Intrabench//** is designed to fit most businesses, however many aspects of **Intrabench//** can be configured to make working with it easier.

The configuration panel is simple and intuitive

Configuration is restricted to only your admin users and can be configured by **Intrabench//** staff or by yourselves. You can create your own data fields, users, access settings, groups, invoice settings and change many other aspects of **Intrabench//** through the intuitive control panels.

Custom Data Fields

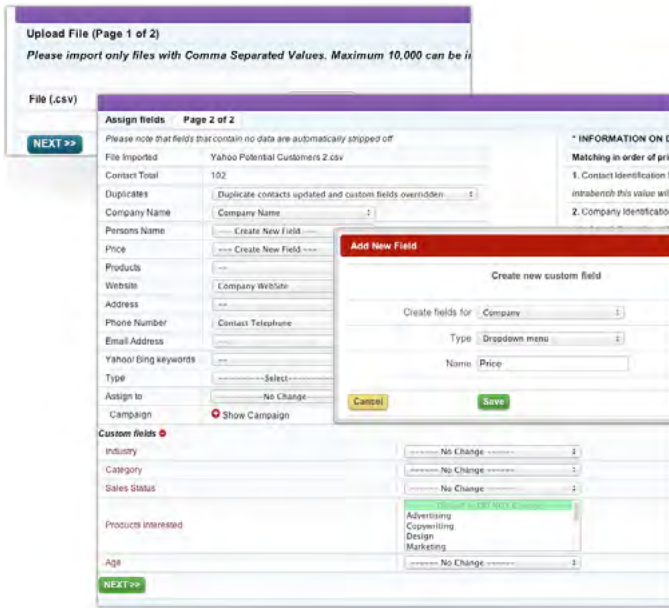
Fields are the main part of the system and you can create a series of custom fields linked to many parts of the system. Each data field can store your own data, for example 'sales status' or 'products purchased'. Fields can be select boxes, date, text, checkboxes, multi level, file, radio buttons or url. All fields can be searchable, editable and restricted to only certain users or groups. Hide important information or simplify the interface.



Fully customised fields

Switching from another CRM

Intrabench// allows importing spreadsheets and files from other systems. You can also import product catalogues straight in to **Intrabench//**.



Data imported from spreadsheets

The import procedure will create custom fields whilst data is being imported and automatically search for duplicates of data so your data goes in cleanly. You can match fields from your spreadsheet to fields within **Intrabench//** using the interface and assign imports to staff members or new groups. **Intrabench//** also supports data formats from other CRM's for easy migration.

Emails and Logging

Emailing customers from within **Intrabench//** is as simple as clicking on the email address and selecting a template. Templates save you time with repetitive emails and makes mail merging simple. All emails will come from your own email address and you will receive a copy in your inbox. **Intrabench//** also contains an entire email logging system which logs any emails to you or your staff directly under the customers records. One place to see all emails sent and received to a customer from any members of staff.

Technical:

Intrabench// is a cloud based system that has been around for 12 years written with best software practices and principles. **Intrabench//** is hosted in a secure cloud based UK data centre with fast access to national and international routes. Redudancy has been placed at every level to provide an uninterrupted service. **Intrabench//** is designed and programmed in the UK with business consultants who know how businesses work.

With thousands of companies already using **Intrabench//** you can be sure **Intrabench//** will support your business process and model.

Support:

Intrabench// provides email, phone and on-site support options. We are based in the UK and don't outsource our support teams so you get best technical help possible from people who understand your business.

Contact Us:

Telephone: 020 7060 2666

Email: isales@intrabench.com

Website: www.intrabench.com

Sign up for a free trial at:

www.intrabench.com