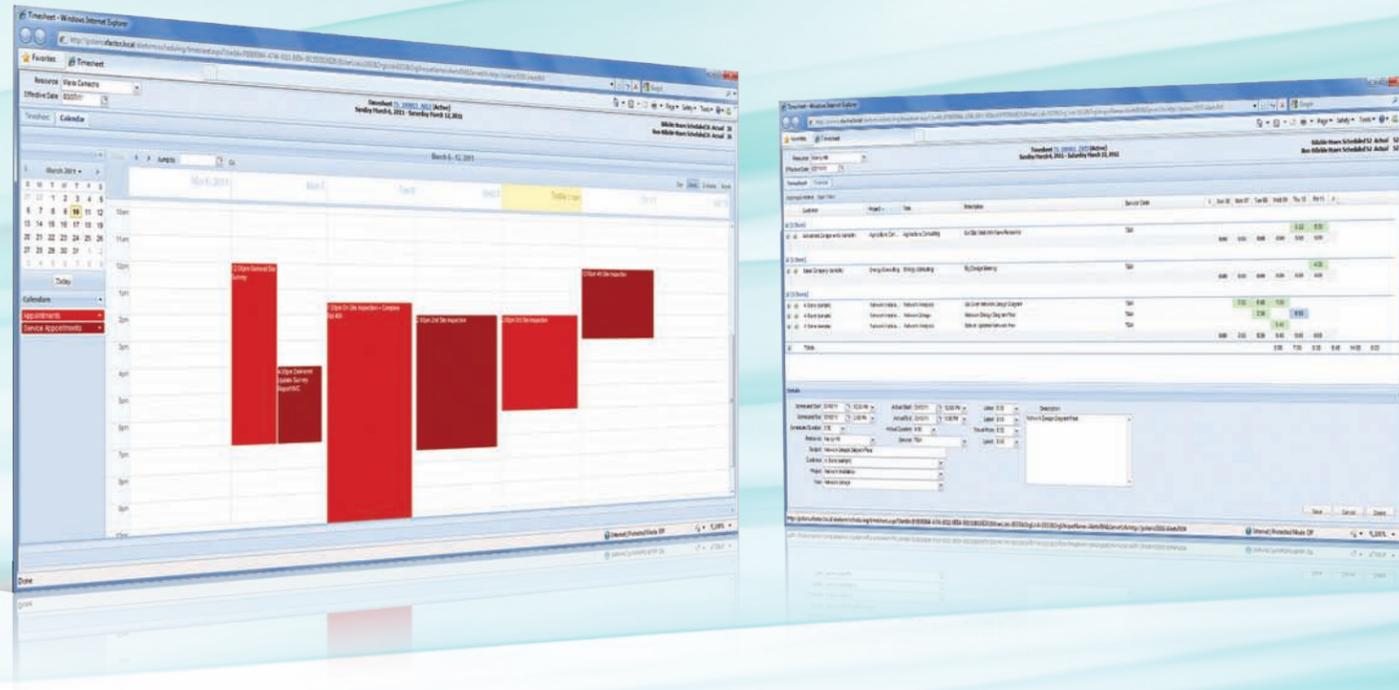


# Microsoft Dynamics CRM and Alert Stratus Professional Services Software

RUN YOUR SALES AND PROFESSIONAL SERVICES BUSINESS BETTER



VISIT US ONLINE AT [ALERTSTRATUS.COM](http://ALERTSTRATUS.COM) TO REQUEST A LIVE DEMONSTRATION.



FOR MORE INFORMATION ABOUT ANY OF OUR PRODUCTS OR SERVICES, PLEASE FEEL FREE TO CONTACT US.

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Spend more time working with customers and less time on administrative tasks with integrated Office, Sales, Service, and ERP.

Take advantage of embedded Alert Stratus in Microsoft Office Outlook.

Complete service software for projects, field service and contract recurring billing.

## YOUR PEOPLE: SPEND MORE TIME WITH YOUR CUSTOMERS

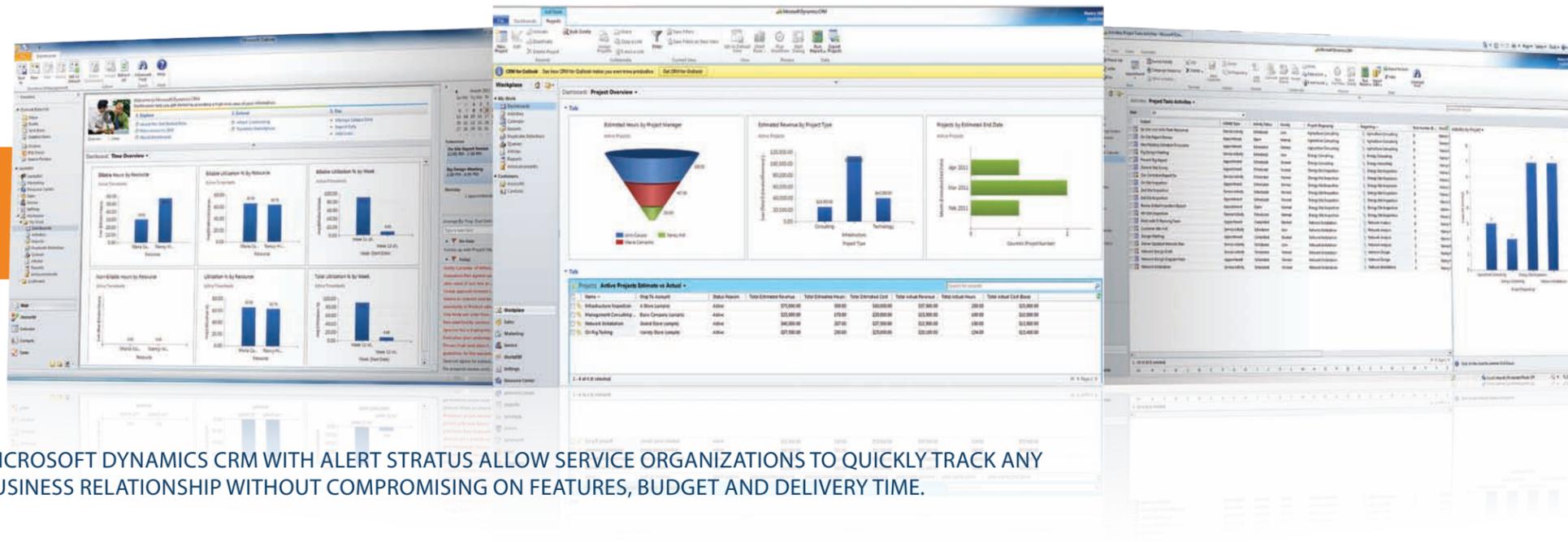
Give your service team the connectivity to Microsoft office they are looking for. Now emails, appointments, and tasks are directly linked to Projects, Timesheets, Expenses, Cases, Contracts, and Customer Billing.

- + Combine Sales & Service Pipelines
- + Convert Quotes to Projects, Cases, and Contracts
- + Manage Projects Budgets, Revenue and Costs
- + Drag-and-Drop Resource Planning Capabilities
- + Real-Time Timesheet & Expenses Tracking
- + Powerful Project, Field Service, Contract Customer Billing
- + ERP Integration



# Manage and track all customer-facing activities.

Identify trends and provide personalized service with access to real-time, actionable data.



MICROSOFT DYNAMICS CRM WITH ALERT STRATUS ALLOW SERVICE ORGANIZATIONS TO QUICKLY TRACK ANY BUSINESS RELATIONSHIP WITHOUT COMPROMISING ON FEATURES, BUDGET AND DELIVERY TIME.



ALERT STRATUS IS FLEXIBLE, BECOMES MORE FLEXIBLE AS YOU USE IT, AND KEEPS INCREASING YOUR PRODUCTIVITY.

## // Alert Stratus Portals

Secured cross-browser portals are supported for employees, contractors, and customers. Employees and contractors can create and edit appointments in a list or calendar view.

## // Customer Billing

Eliminate billing delays. Alert Stratus' project and field service billing system provides fixed price, time and material, progress, and hold back billing. Contract recurring, retainer, and preventative maintenance billing is supported as well. Work in process, revenue and cost recognition reporting is standard. Multi-currency support and flexible service rates covers it all for you. Optional financial integration using the Microsoft Dynamics connector provides your ERP enterprise with a complete business system.

## // Reporting Monitoring Analysis

Alert Stratus reporting includes project, contract, and service call analysis. Monitor project budget vs. actual, gross margin, variances, backlog, earned revenue and costs. Contract profitability reporting and service call performance measures success with customers. Resource utilization analysis combined with

new opportunity forecasts provides you with the data you are looking for day in and day out.

## // Workflow and Escalation

Alert Stratus workflow and notification tools makes software fit your business and not the other way around. It allows you to easily embed your best practices into customer-facing interactions, ensuring customer service your way every time. Automatically assign activities to specific individuals or groups with rules-based escalations that address issues quickly.

## // Customization Tools

Alert Stratus is flexible and easy to customize. Take advantage of drag-and-drop form design, point-and-click business rules, and simple database administration to easily meet the unique needs of your business.

## YOUR PEOPLE: SUPER CHARGE STAFF PRODUCTIVITY

Give your people familiar and intuitive tools to help them be more productive. With seamless integration to Microsoft office all your customer emails, tasks, and appointments are visible in every service interaction.

## Alert Stratus Features

Combining Microsoft Dynamics CRM with Alert Stratus provides unprecedented integration between sales opportunities and service delivery. Give your organization the collaborative software that will assure improved profitability and competitiveness.

### // PROJECT MANAGEMENT

Manage your project engagement and installation jobs in one complete system. Access projects directly within Microsoft Outlook and automatically link appointments, emails, and tasks. Yes, you can even do this when not connected to your corporate network.

You can create project portfolios, perform multi-level task aggregation, enter budgets, cost categories, and define customer billing options. You can monitor tasks, plan resources, schedule appointments, and track % complete at

several levels. Run project views, charts, and reports right from within Microsoft CRM dashboards.

### // FIELD SERVICE MANAGEMENT

Alert Stratus extends Microsoft Dynamics CRM cases to a new level. Field and support case billing is now supported. Provide time and materials pricing, flat rate, first period, mileage pricing for labor and travel. Alert Stratus field service offers, a customer asset database, dispatching, warranty tracking, and preventative maintenance scheduling.

### // ALERT STRATUS CONTRACT SUPPORT

Alert service contract customer recurring billing functionality. Price your product and maintenance services right down to specific devices. Flexible billing and renewal frequencies are supported. Update your contract lines, and let Alert Stratus takes care of prorating your next customer invoice. Support and field service cases default contract/warranty entitlement automatically, minimizing revenue leakage.

### // RESOURCE ASSIGNMENT SCHEDULING

You can use Microsoft Dynamics CRM service activity scheduling as well as

the Alert Stratus can drag and drop technique for generating employee calendar activities. Resource planning management allows you to search for the right resource skills, certificates, and centralized calendar availability.

### // TIME AND EXPENSE REPORTING

We know getting time and expense information from the field quickly is critical for billing and payroll processing. Alert Stratus project time tracking software makes it easy for resources to report hours, expenses, and progress. Times and expenses can be entered via cross browser portal, Outlook Client or PDA mobility support. Customizable workflow allows for approval processing.