

CRM, Dashboard, Alerts, Report Scheduler & Distribution

InSight



**IMPROVE
THE PRODUCTIVITY
OF YOUR STAFF**



“We liked its clean and seamless interface with R2, plus the pricing was so competitive that our decision to select InSight was a no brainer”

Robert Ayers, Business Systems Specialist, Staging Connections Group Ltd.



Improve the Productivity of your staff



Contact Manager

All information about your suspects, leads and customers are at your fingertips
Maintain a clean data base by flagging for duplicates on selected fields
Sales persons can effectively manage their pipeline, set up follow up tasks etc.
Two way synchronization with Outlook
Configure system to show key business information about a customer in InSight



Dashboard

Personalize the landing page to display information that is important to you
Information can be displayed from R2 and other third party systems
The display can be in a graphical or tabular format



Alerts

Set up alerts on real time data values
Alerts can be sent to a desktop or a mobile device
Auto-send an alert for a PO to be authorized by a designated individual
If total discount exceeds on an order exceeds x%
If a sales person creates an order with a value greater than a certain amount etc



Report Scheduler and Delivery

Schedule to run reports at a predetermined time
Deliver these reports from R2 or other third party systems



Move Orders created in Excel to R2 using InSight

Take Charge with InSight



Web based and fully integrated with R2 and Outlook. InSight provides your sales staff the tools to effectively manage their pipeline. Your sales staff can create their own dashboard that shows key information they need to focus on, with the ability to drill down and get all the details needed to manage their opportunities.

You can also schedule reports to run at a predetermined time and have these emailed to selected personnel. Information from InSight can be viewed/updated from several popular mobile devices.

