

# Here's a sampling of customers and why WiredContact Enterprise was selected as their CRM of choice



**Situation:** National company with 95 users comprised of 8 divisions needed a centralized system to manage sales team. Had 4 weeks to rollout. IT Staff experts in MySQL and had to link to billing system. Over 20,000 records had to be imported from legacy system with hundreds of fields.

## WiredContact Enterprise Solution:

- Multiple user security profiles were assigned; different permissions defined across different tables
- Billing data displayed as read only from MySQL external database; real-time sales links show on tabs
- Company took advantage of flexible licensing with concurrent and named licenses
- Numerous custom reports created defined with multiple scope/filters to aid rep in seeing highest sales potential accounts. Generate in WCE or download to Excel with a link.



**Situation:** Equipment leasing company with 14 users was using ACT! for Web with unsatisfactory results. AFW was slow and users could not easily associate critical information to Sales opportunities to run opportunity reports.

## WiredContact Enterprise Solution:

- WCE's built-in import utilities were used to convert all data from AFW, including attachments, to WCE
- 20 custom fields were added to the Sales opportunity view, along with agent commissions calculated
- Sales Lookup with multiple search fields allows users to easily find sales opportunities linked to Vendors
- Users claim that navigation in WCE vs. AFW has saved them at least 50% of their time looking for information.



**Situation:** Leading independent investment management firm was growing rapidly. Was using WiredContact for ACT! with 55 users, but limited by the ACT! database in terms of speed and records. Growing team needed access only to records in their states. They also needed to provide field users with a Blackberry solution.

## WiredContact Enterprise Solution:

- Upgraded company to WCE using SQL Server Express. Now up to 80 users. Performance greatly enhanced.
- Applied WCE user security with managing team rules, allowing Brinker to assign users to only see the records they were allowed to see in each state.
- WiredContact Enterprise mobile was installed (included with license) for users to get real-time access to information from their Blackberries.



**Situation:** Fast growing start-up uses 3<sup>rd</sup> party Agents as their sales team. Agents need to register leads before working on the account. Needed to manage sales pipeline in real-time in addition to projects. User security was of utmost importance. Agents could not edit rates & amounts on Sales opportunities, and rates on opps had to be defined by values selected in certain fields.

## WiredContact Enterprise Solution:

- Agents were provided a Lead Registration form inside of WCE. They could not schedule activities, write to history or email leads until they were approved by someone in corporate. Predefined links on the Lookup leads.
- Agents saw different layouts on contact records based on whether or not the registered lead was approved.
- Field level security applied so agents had read-only fields on several tabs, and could not see fields included on corporate staff layouts. Sales Opportunities calculated commissions to Agents, Company & customer.



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