

InspHire CRM Factsheet

- **Accounts maintenance:** - Allows the creation and maintenance of accounts be these customers or prospective clients, these can be linked to an account in a Core inspHire Product where the two are linked (Corporate/Office).
 Where Linked to an inspHire Core Product (Corporate/Office) seamless creation of Rental/Sales Estimates can be performed from either solution and shown in both.
 Attributes recorded against an account/prospect can be added and customised.
 Custom import and export routines.
- **Prospect maintenance:** - Allows the creation and maintenance of Prospective Clients.
 Attributes recorded against prospect can be added and customised.
 Custom import and export routines.
- **Contact maintenance:** - Allows the creation and maintenance of Contacts that can be linked to one or more accounts/prospects.
 Where Linked to an inspHire Core Product (Corporate/Office) these can be linked to contacts in the Core Product.
 Where Linked to an inspHire Core Product (Corporate/Office) seamless creation of Rental/Sales Estimates can be performed from either solution and shown in both.
 Attributes recorded against contacts can be added and customised.
 Custom import and export routines.
- **Activity maintenance:** - Allows the creation and maintenance of activities against an Account, Prospect or Contact of customisable types.
 Where Linked to an inspHire Core Product (Corporate/Office) Activities of the type opportunity can be created in the Core Product. Can set automated reminders for activities against one or more users/contacts. Can be exported. Customisable attributes recorded against an activity can be created, be this in general or specific to a type of activity.
- **Attribute maintenance:** - Allows the creation and maintenance of attributes for each different entity (Account, Prospect, Contact or activity).
 Attributes can be set as mandatory or not. Attributes can be applied in screen views and filtering of data results. Attributes are exportable.
 Can create and customise lists of values for custom attributes which can be exported.
- **Security Attribute maintenance:** - Allows the creation and maintenance of attributes for the security database that can be exported.
- **Business Units:** - Allows the creation and maintenance of Business Units that can be exported.
- **Resource maintenance:** - Allows the creation and maintenance of Resources that can be applied against an account, contact, prospect or user account. Business units can be exported.
- **Topics maintenance:** - Allows the creation and maintenance of Topics that can be exported.
- **Projects maintenance:** - Allows the creation and maintenance of Projects that can be exported.

- **Campaign management:** - Allows the creation and maintenance of Campaigns that can be linked to and emailed through MailChimps' API (Requires an active Mailchimp account). Campaigns can be exported.
- **Dashboards:** - Allows the creation of Dashboards with customised layouts and KPI Pods.
- **Views:** - Can create custom views for filtering entities (Account, Prospect or Contact) which can be set as default and can be exported.
- **Reports:** - Supplied with a default suite of reports that can have custom views/filters applied when used. Can create own report groups. Can add customised report templates (requires prior custom template creation using Crystal report outside of inspHire CRM).
- **Roles:** - Can create custom roles to be applied against user accounts. These can be exported.
- **Users:** - Can create user accounts, if linked to an inspHire Core product this user account will be linked to that users account in the core product (Corporate/Office). These can be exported.
- **Microsoft Active Directory Security:** - Where linked to an inspHire Core Product and AD Authentication is used for the Core Product, AD authentication can be applied against the users accounts in CRM.
- **Active Sessions:** - Ability to view current active user connections to the CRM system.
- **GDPR:** - GDPR Suite of tools and utilities provided with search and edit screens which allow printing of searched results. Inactive Accounts, Contracts and prospects search and update tool. Configurable data retention settings/rules with a mass check, clear and removal utility. A data audit trail created when list values/properties are changed. Audit trail of all views exported or reports that are ran. User account login and logout audit trail recorded.
- **Calendar:** - Calendar to show activities.

Additional Modules/addons

- **CRM Exchange Sync:** - Allows the creation of activities with the type Exchange Appointment that will store the appointment within inspHire CRM and synchronise this with the attendees Microsoft Outlook Calendar that exist in the interlinked Microsoft exchange server. Synchronises exchange appointments for configured users from Outlook calendar to inspHire CRM. Not part of the Core Product.
- **CRM IX:** - Provides an API link to the CRM data and provides limited CRM functionality from a web page front end for Accounts, Contacts, Prospects and Activities. Not part of the Core Product.