ProspectSoft CRM

helping your business run more efficiently

Bring customer and business information into a single view with ProspectSoft CRM's unparalleled integration to Access Dimensions, Exchequer, Pegasus Opera & Sage 50, and increase the efficiency and effectiveness of your business.

The ProspectSoft Difference

A really good eCommerce site is fast becoming a must-have for any business. B2B customers want to place their orders on a professional looking, efficient online ordering portal. They expect consistent pricing, product details and payment options whether face to face, on the phone or over the web. If they get 60 days credit and a 20% discount over the phone, they won't use your site unless the terms are as good (or slightly better) online.

ProspectSoft CRM provides your staff with an up to date and integrated view of information and processes which will reduce the time spent on admin, saving you time and money, as well as providing your customers with an informed service.

CRM without deep, out of the box integration only gives you half of the story – if you are a customer of Access Dimensions, Exchequer, Pegasus Opera or Sage 50 then using ProspectSoft CRM will combine extensive CRM & accounting information for a much more powerful insight

Your customers will notice the difference.

Allow your customers to place orders 24/7

Consolidating your business and customer information into one single view will streamline your business processes helping you run your business more efficiently. You will notice the difference, from lead follow-up to order taking; making better use of employee time.

Enable your team to provide effective customer service

ProspectSoft CRM is accessible in the office and on the road and will equip your sales team with up to date, valuable customer information from your accounts solution, enabling them to provide an informed and professional service to customers.

Generate quotes effortlessly

When generating quotes, product and pricing information (including special pricing options) can be taken directly from your accounts solution. ProspectSoft CRM allows the user to see current stock levels, sales history, product groupings and pricing, customer on-stop details and credit ratings.

Directly confirm orders into your accounts solution

ProspectSoft CRM's accounts integration eliminates the need for time consuming, error prone re-keying of data and instead offers the ability to directly confirm orders into your accounts solution.

Improve reporting and forecasting

Moving away from multiple spreadsheets containing out of date data and enabling your staff to access and update core customer information in a user friendly format will produce accurate business reporting.