



CRM

For
Construction Suppliers
Contractors
Engineers
Architects



AVL Systems - Head of Marketing

"Although a good CRM, Salesforce was not "the best" CRM for our company. After extensive research, we decided to go with Project-SalesAchiever and I don't think that we could have made a better choice. Not only has Project-SalesAchiever CRM met ALL of our needs, but the staff at Project-SalesAchiever has constantly delivered excellent customer service. For companies that are project-based, such as those in the construction industry and ourselves, Project-SalesAchiever CRM is the #1 CRM option available today.

Project-SalesAchiever CRM is specifically designed to manage the complex sales process around the Construction Industry. Whether Architect, Engineer, Contractor or Product Supplier, Project-SalesAchiever CRM is both powerful and easy to use.

Project-SalesAchiever CRM software gives companies in the construction industry an affordable solution that is simple to use and quick to deploy.

It combines all the features you would expect from a powerful CRM package and also includes the powerful activity and project business lead management.

Project-SalesAchiever CRM takes company, contact, activity and project information and translates it to meaningful information, to empower your teams to begin and manage the business development process from rumor to order in the marketplace.

Project-SalesAchiever - Key Features

- Time management & scheduling for all users, Microsoft Outlook Calendar and Service Scheduling Calendar
- Powerful Quotation and Estimate management
- Unlimited configuration capabilities
- Easy control of who sees which records, fields and what they can do to them
- Project opportunity management - pipeline & forecasts
- Powerful reports, list managers & InfoSearch™ gives instant access to key information
- Workflow and email alerts

Your Outlook in Project-SalesAchiever CRM

The screenshot displays the Project-SalesAchiever CRM interface. At the top, the menu bar includes 'New', 'Search', 'View', 'Tools', 'Administration', and 'Help'. Below the menu, there are tabs for 'List Manager', 'Outlook Calendar', and 'Outlook'. The main area shows a calendar for January 2014, with a specific appointment highlighted for Monday, January 6th at 8 AM: 'On site meeting RE Office Projec'. An appointment window is open over this appointment, titled 'Meet Ron Re 2 Proposals - Appointment'. The window has a ribbon with tabs for 'FILE', 'APPOINTMENT', 'INSERT', 'FORMAT TEXT', and 'REVIEW'. The 'APPOINTMENT' tab is active, showing fields for 'Subject' (Meet Ron Re 2 Proposals), 'Location', 'Start time' (Fri 10/17/2014, 11:30 AM), and 'End time' (Fri 10/17/2014, 12:00 PM). The body of the appointment contains the text: 'Ron has had 2 proposals from us for the Atlanta Office Project, I need to speak with him to confirm go-ahead.' Below the appointment window, the CRM interface shows a dropdown for 'Appointment' and a list of fields: 'Company' (390 Architects inc), 'Contact' (Ron Gans), and 'Project'. A 'Select a Project to link to' dialog box is also visible, showing a list of projects with columns for Title, City, and State.

There are some things in our business we don't want to change if we don't have to. Our Microsoft Outlook Calendar is one of them.

Project-SalesAchiever CRM embeds your personal Microsoft Outlook calendar inside Project-SalesAchiever. Your action record in Microsoft Outlook is then given full functionality from Project-SalesAchiever to link your actions to Projects, Companies, Contacts and Quotations if required.

The screenshot shows the Microsoft Outlook interface. On the left, the 'Email Details' pane is open, showing 'Overview' and 'Information' tabs. The 'Information' tab displays fields for 'Email status' (Not Sent), 'User action is for' (Angelo Ferro), 'Start Date' (Monday, October 20, 2014), 'Start Time' (3:52 PM), 'Duration' (0), 'Company' (360 Inc.), 'Contact' (Mr Ron Gans), 'Project' (Metro Bank Park Phase 2), and 'Description' (360 Inc.). In the center, the 'Compose' window is open, showing a 'New Message' form with fields for 'From' (aferro@360inc.com), 'To' (raars@360inc.com), 'Cc', 'Bcc', and 'Subject'. The ribbon at the top includes 'FILE', 'MESSAGE', 'INSERT', 'OPTIONS', 'FORMAT TEXT', 'REVIEW', 'ADD-INS', and 'ADOBE PDF'. The 'MESSAGE' tab is active, showing options for 'Attach File', 'Attach Item', 'Follow Up', 'High Importance', 'Low Importance', 'Zoom', and 'Start Linking'.

Email can also be sent and received through the Project-SalesAchiever CRM solution.



The Company Record

The Company Record configuration can be out of the box or completely personalized to meet your needs. Simple or sophisticated, in the Cloud or on premise, mobile or in the office, it's your choice.

The Company Record here is set up to be easy to use, with minimal data entry requirements.

Company Details

Name: 390 Inc.
 Address: 6155 Park South Drive
 City: Charlotte
 State: North Carolina
 Zip: 28210
 Country: United States

Telephone, Fax & Web:
 1-800-915-3597
 1-800-915-3596
 www.390inc.com

Location: [Map showing location in Charlotte, NC]

Company Type: Contractor

Role	Title	Site City	Lead Status	Market	Project Value	Value to Us	First Name	Last Name
Architect	2334 High R...	New York	2. Target	Civil	\$750,000	\$350,000	Ron	Gans
Tenant	ABC Cooler ...	New York City	2. Target	Civil		\$200,000		
Architect	Apartments ...	Charlotte	6. Won	Civil	\$23,000,000	\$600,000	Ron	Gans
Architect	Big High School	Tampa	6. Won	Civil	\$400,000,000	\$1,000,000	Ron	Gans
Architect	Metro Bank ...	Harrisburg	2. Target	Industrial	\$500,000	\$4,500,000	Ron	Gans

Record Details

Created On: 10/6/2009
 Created by: IMPORT
 Last Edited on: 10/6/2014
 Last Edited by: PSAGO

Google News

- Works by **390 inc** and David Messon listed by architecture Building Design - Jan 17, 2013
- 390 Inc** and David Messon are among the architects whose work has been recognised in the latest round of ...
- What Could **390 inc.** Bring to Baltimore? Curbed National - Jan 17, 2013
- Labelled "Architects of the future" by The New Yorker's architecture critic
- Ready to splash out? \$100 on an apartment ... Daily Telegraph - 13 hours ago
- The new apartments, designed by **390 Inc.** ...
- Apartment design by PRQI; **390 Inc.** in Philly; More! Curbed National - Jan 17, 2013
- Apartment design by PRQI; **390 Inc.** in Philly; More! ... NYC-Architectural
- 390 Inc** to join spate of High Profile Condo ... Architectural Times - Jan 25, 2013
- 390 Inc** hasn't had great luck in Boston — their public Art Gallery The Sm
- Chances are 'slim' of getting **390 Inc.** back on Shanghai p Architect Newspaper - Jan 3, 2013
- Shanghai's chief architect, told Archi.ch a Chinese architecture news webs
- 'Starchitects' turn City Street into skyscraper Int London Standard - Jan 10, 2013
- ... Including **390 Inc** and James Terry designing skyscrapers
- Architects Minds — What's Happening January 10-16 Evening Post - Jan 9, 2013
- 390 Inc.** youth day — 9 a.m.-2 p.m. Jan. 16: 390 Design Ideas... aspects

Latest information on your customer from Google News

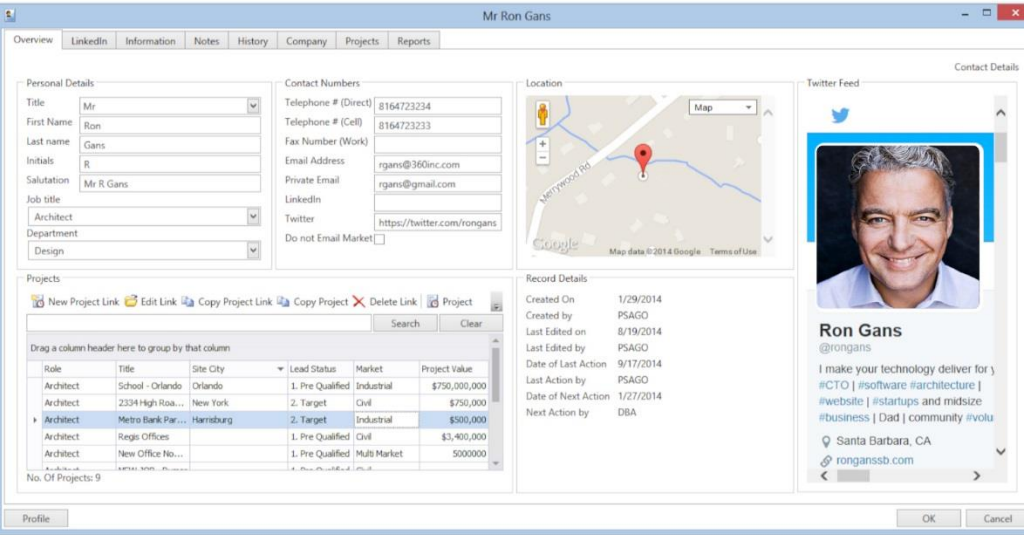
Easy to switch on more functionality if needed.

Opportunities

Description	Value	Service Type	Project Status	Title	First Name	Last Name
Architectural	\$185,000	Design	6. Won	Mr	Ron	Gans
Construction Products	\$240,000	Design	3. Estimating	Mr	Mike	Reed
Contracting Services	\$1,825,000	Design	3. Estimating	Mr	Mike	Reed

Win more business against every project with the opportunity feature in Project -SalesAchiever. The opportunity module feature can be useful if more than one piece of business can be won or lost against any single project.

Contact Management

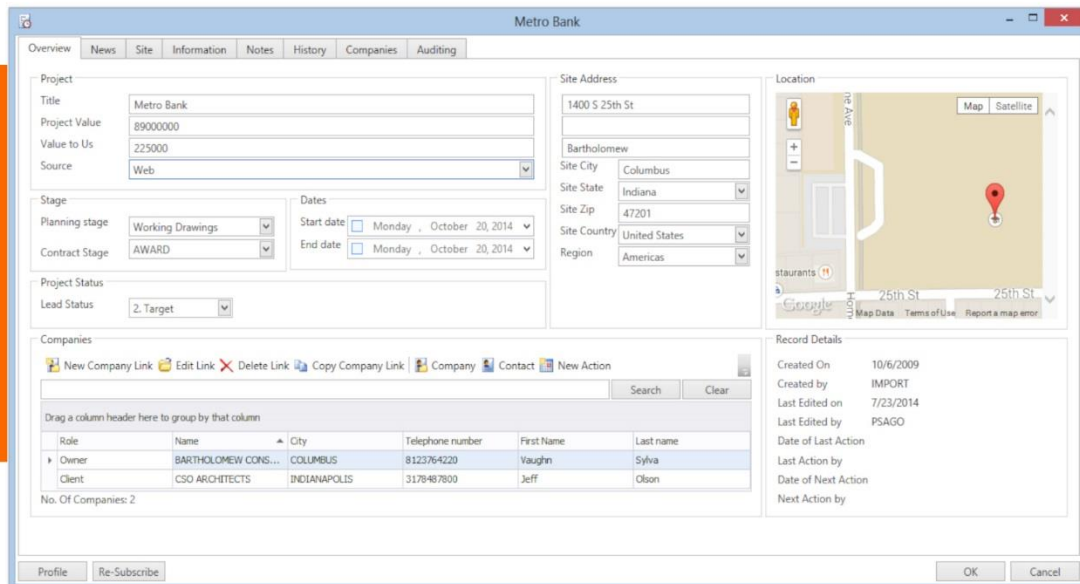


Your initial overview of a contact will give you more information in an instant, to enable you to engage your customers more effectively. When you look at the information from a customer centric perspective, you can see associated projects, company, actions as well as their social networking activities.

Many companies have this 'data' in their business, although it is held in separate systems, different departments and never allowing you to see a holistic view of your contacts. Project-SalesAchiever brings all the data together ensuring users see more opportunities, enabling them to sell more effectively and deliver a better service to the customer.

When you speak to a contact in the construction sector, there is so much we need to know to enable us be professional and deliver a service that will give us a competitive edge. We not only need to see all actions but associated projects, social activity and much more.

Project Lead Tracking



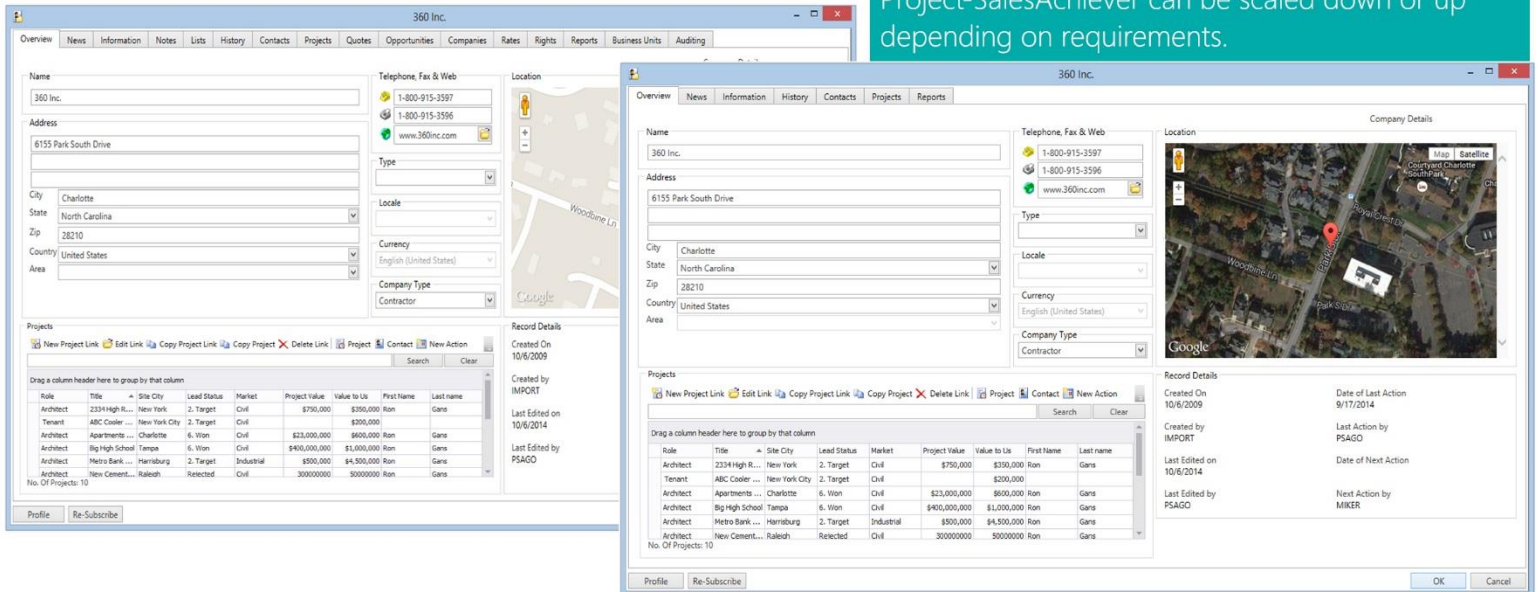
A project centric approach is needed when companies need to co-ordinate successful selling activity around projects when there may be many contacts, companies, quotations, documentation that all needs tracking to a successful conclusion.

Seamless Integration with Construction Lead Data such as Dodge, Reed, BCI, Glenigan, ABI and CIS



Scalability and Customization

Any field or tab can easily be relabled. Project-SalesAchiever can be scaled down or up depending on requirements.



Customizable Dashboards

Dashboard release enables more flexible report writing, where companies using Project-SalesAchiever can present data from just Project-SalesAchiever CRM or collectively from additional solutions such as ERP software.



Personal Dashboard - Mike Davies

4

Appointments next 7 days

32

Phone calls next 7 days

18

Number of Projects with next actions by me

14

Number of projects won, owned by me YTD

17

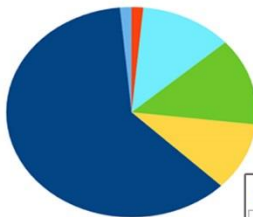
Projects owned by me forecasted to win this year

Jan 31 2014

Today's actions

- Wednesday March 14, 2014**
 9:00am - Appointment - **360 Inc. Construction**
 Meeting with Mike - Metro Bank Project
- 10:30am - Appointment - **Amidex Architects**
 Meeting with Stuart Hall - Munro Detention Center
- 2:30pm - Telephone Call - **XZY Architects**
 Call Rick Martin - Metro Bank Project
- 3:00pm - Appointment - **Jarvis Architects**
 Meeting with Megan Taylor - University Project
- 4:30pm - Telephone Call - **Davis Healthcare**
 Call Mike Roberts - New Out Patients Center
- 4:45pm - Telephone Call - **360 Inc. Construction**
 Call Sarah Davidson - New Apartment Complex

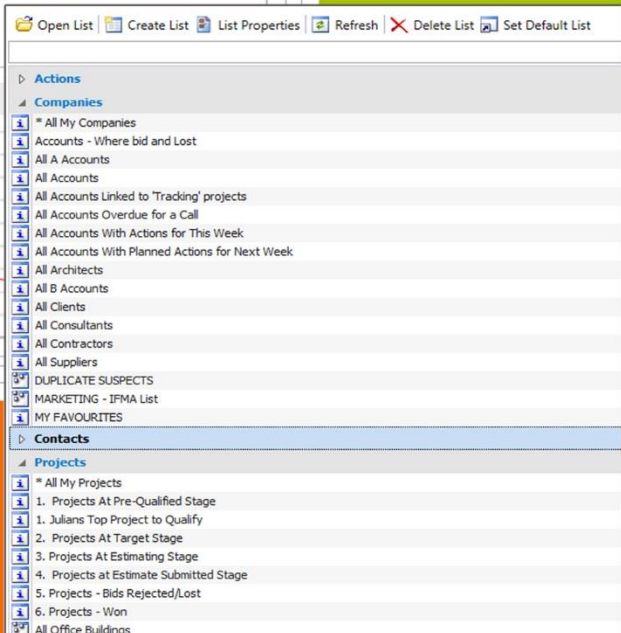
Appointments / Phone calls by company type- YTD



Project pipeline next 12 months



Management reports for all users at anytime. Dashboard reports can be configured to any company or individual user's requirements. Giving you an instant picture of where we are to date.



Project-SalesAchiever List Manager

Any user, if assigned the rights, can write and store their own reports within the CRM through the unique Project-SalesAchiever List Manager. Your list and reports can be shared or kept private. The List manager can be used to drive E-Blasts, manage project pipelines, manage key accounts and more.

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Loveland, CO 80538
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1-800-915-3597

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Canada
1-800-915-3597

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Oxfordshire, OX15 4FF
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Call us today on 1 800 915 3597 for Free Demonstration