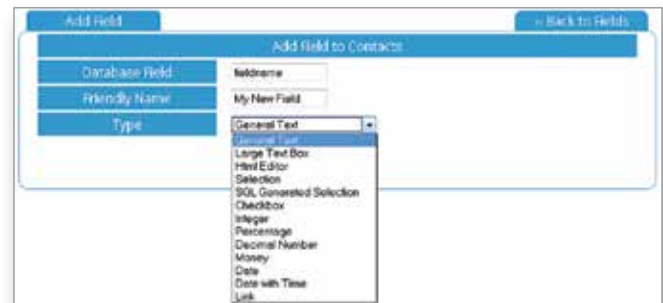
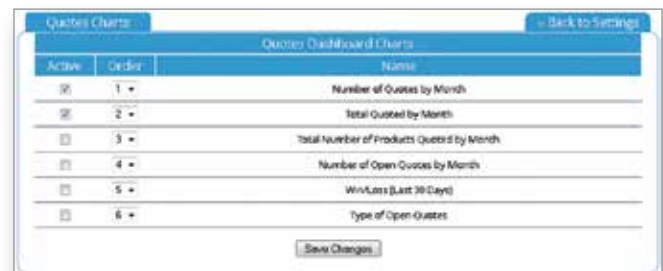


Universal Features

Germane CRM increases profitability, organization and automated processes by offering all of the features that your company demands.

- A very simple interface that is easy for everyone to use
- A CRM that you can use on any internet device: phone, tablet, Mac, or PC
- Easily create your own custom fields in the database
- Store a virtually unlimited number of records
- Option to automatically capture and link all emails, no manual steps
- All changes made to records are tracked and the history is kept
- Search and filter lists using any criteria you want
- Send email marketing to any list in your database
- Import/export from Excel
- Attach files to any record
- Easily search for and find what you are looking for
- Create your own custom dashboard for each module in the CRM
- Reports that export to PDF/Word/Excel/XML
- A product that is designed to be customized according to your business needs
- Choose to run your CRM on our servers or yours, change any time

Active	Order	Name
<input checked="" type="checkbox"/>	1	Number of Quotes by Month
<input checked="" type="checkbox"/>	2	Total Quotes by Month
<input type="checkbox"/>	3	Total Number of Products Quoted by Month
<input type="checkbox"/>	4	Number of Open Quotes by Month
<input type="checkbox"/>	5	Win/Loss (Last 30 Days)
<input type="checkbox"/>	6	Type of Open Quotes



Type	Attachment	Description	Delete
Attachments	Website shipping charges.pdf	Formalities with shipping options for this customer	<input type="button" value="Delete"/>
Attachments	Website shipping charges.pdf	Formalities with shipping options for this customer	<input type="button" value="Delete"/>



Automatically Captures All Emails

- Germane CRM has the ability to capture all of the email communications between sales representative and customers, whether they use their cell phone, iPad, Mac or PC.



Quotes Charts Back to Settings

Active	Order	Name
<input type="checkbox"/>	1	Number of Quotes by Month
<input type="checkbox"/>	2	Total Quoted by Month
<input type="checkbox"/>	3	Total Number of Products Quoted by Month
<input type="checkbox"/>	4	Number of Open Quotes by Month
<input type="checkbox"/>	5	Win/Loss (Last 90 Days)
<input type="checkbox"/>	6	Type of Open Quotes

[Save Changes](#)

Report Name	Format
Contact Label	PDF WORD EXCEL HTML4.0 MHTML IMAGE CSV XML

Audit Back

Audit of John Smith

Timestamp	History	User
March 8, 2013 1:11 PM	Company: xyz Company	Mathieu LaPalm
March 8, 2013 1:11 PM	Last Name: Smith	Mathieu LaPalm
March 8, 2013 1:11 PM	First Name: John	Mathieu LaPalm
March 8, 2013 1:11 PM	Created	Mathieu LaPalm

Import from Excel Back to Settings

Import from Excel (.xls)

Select the Module to Import To: Contacts

Select the File (.xls) to Import From: Browse... Test Import.xls

First Row has Column Names: ☒ Check this box if the first row of your Excel spreadsheet has the column names in it

[Next](#)