BRIDGEDexchange
customer relationship management

Bridged Exchange

Bridged Exchange works as a complete solution to lead management using a web based CRM application. Leads enter the application through forms on multiple websites. All the data is collected and stored into an enterprise database.

Once the form is filled out or some designated action takes place on the site, the information is logged in the database. This allows the administrator to log into the application and generate reports based on the collected data.

Leads can be categorized into an unlimited amount of categories and subcategories, status levels, and descriptions to help the application users group and organize the leads in the system.

Forms that are on websites are created within the application and then pasted onto the specified HTML document to post the information to the Bridged Exchange database.

Web Stats can also be integrated into the application to give user direct access to site path information about the users that have performed an action on the site.

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Lead Management

All the data is collected and stored in an enterprise database. The leads are categorized based of the assignments and attributes of the leads.

Sales Management

Contacts can be converted to a Client while retaining all the same information associated to the contact.

Employee Management

Manage employees by assigning the leads to the selected employee. Either manual assignments or automatically assign the leads as they come in. Employees also have different levels of access to the application features.

Calendar Features

The calendar has three different types of displays. Different colors represent Contacts, Clients, and Events within the system. The calendar is based on a date range form, which allows users to click on a specific day and bring up the associated events, contacts, or clients.

Document Management

Upload documents, images, and files to help manage the contact history with the sales process. Documents are added to specific folder based on the username and password of the account holder.

Sales Process Automation

Each time an action takes place, a step is taken to respond or to follow up with the contact. This includes setting up events.

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Custom Contact Forms

Forms are created inside the application. The code generated for users to cut and paste the code on to a web page. The page will collect the data and post it to the database.

Customer History

Contacts build a customer history based on the sales process. Each action that takes place either on the front –end of the shopping cart or through the call center, each order or form is collected and saved for reporting purposes.

Employee Access

Each employee that is created for each group account will have a specific type of access to use while inside the application. The following access is available to use: Admin. Support, Sales, and Demo.

Custom Integration

Custom integration of third party programs is available at a flat rate quote based on hourly rates and estimated time of development required. Some custom integration is quite simple, while others can take considerable amount of time to create an efficient solution.

Statistic Analysis

Each user that fills out a customer contact form will have the contact information saved in the database. Additional services are available to track a site path of a user as that person browses the site and then fills out a contact us form. Showing the site path is a valuable resource when attempting to determine keywords used, search engine used, and page views.

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