

DATASHEET

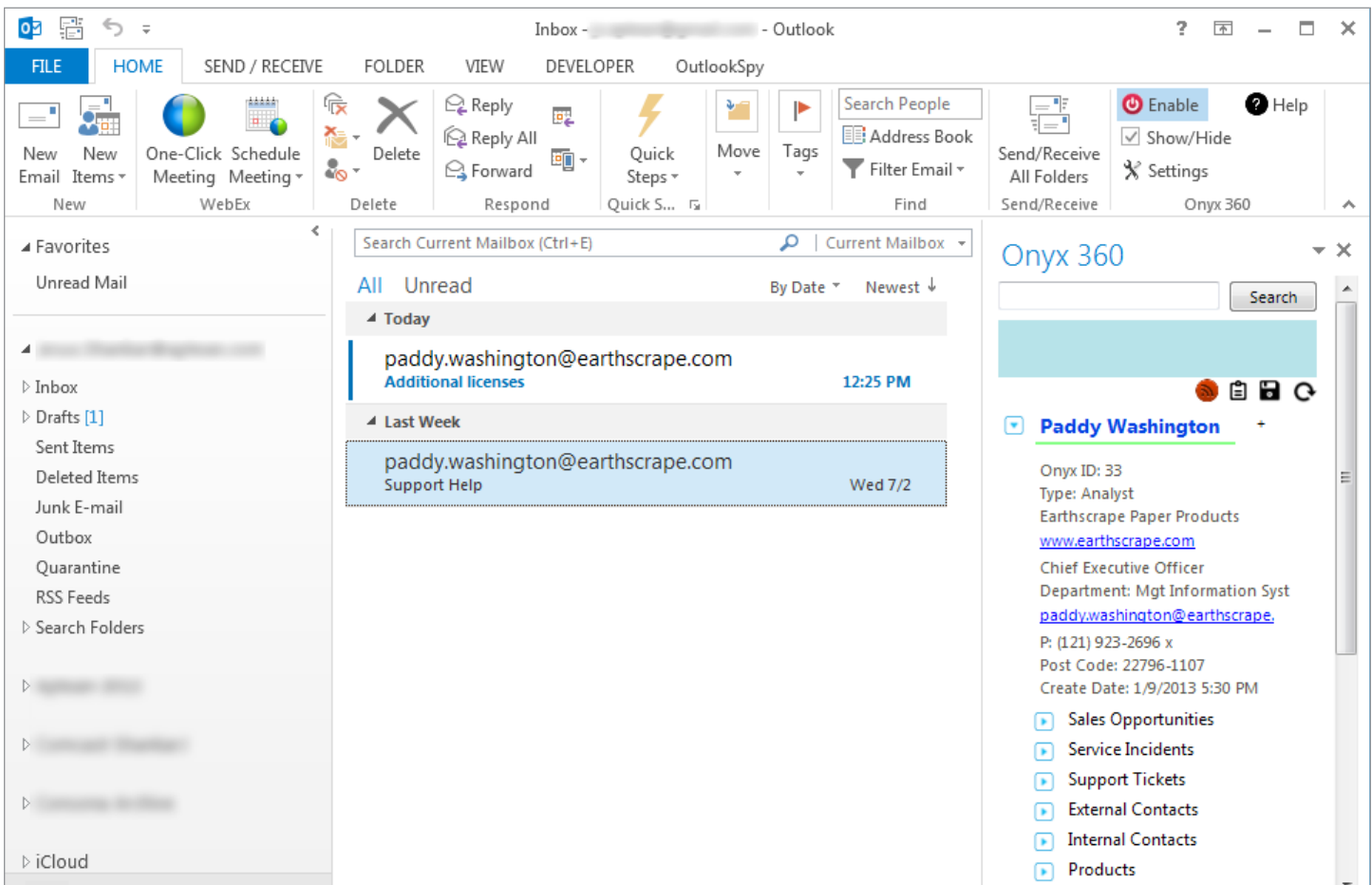
ONYX 360

Connect your CRM with Microsoft Outlook

Onyx understands that a majority of your business is performed via email. Keeping track of your organization's business email correspondence in CRM is a challenge that System Administrators face across the industry.

Onyx 360 is a plug-in for Microsoft Outlook 2010® and above that lets you interact with your Onyx CRM data from the ubiquitous user interface of your email in a convenient side-panel.

With Onyx 360, you can create/update contact records, record opportunities manage relationships and schedule appointments in CRM – all without ever having to leave Microsoft Outlook.



The screenshot displays the Microsoft Outlook interface with the Onyx 360 plugin integrated into the right-hand pane. The main window shows an email from 'paddy.washington@earthscrape.com' with the subject 'Additional licenses'. The Onyx 360 side panel is open, displaying the contact profile for 'Paddy Washington'. The contact details include:

- Onyx ID: 33
- Type: Analyst
- Earthscrape Paper Products
- www.earthscrape.com
- Chief Executive Officer
- Department: Mgt Information Syst
- paddy.washington@earthscrape.com
- P: (121) 923-2696 x
- Post Code: 22796-1107
- Create Date: 1/9/2013 5:30 PM

Below the contact details, a list of CRM categories is shown with expandable icons:

- Sales Opportunities
- Service Incidents
- Support Tickets
- External Contacts
- Internal Contacts
- Products

GET COMPLETE VIEW INSTANTLY

When you view an email from the customer, Onyx 360 provides a convenient side-panel that docks to your Outlook window to provide a comprehensive view into the customer's Onyx record instantly.

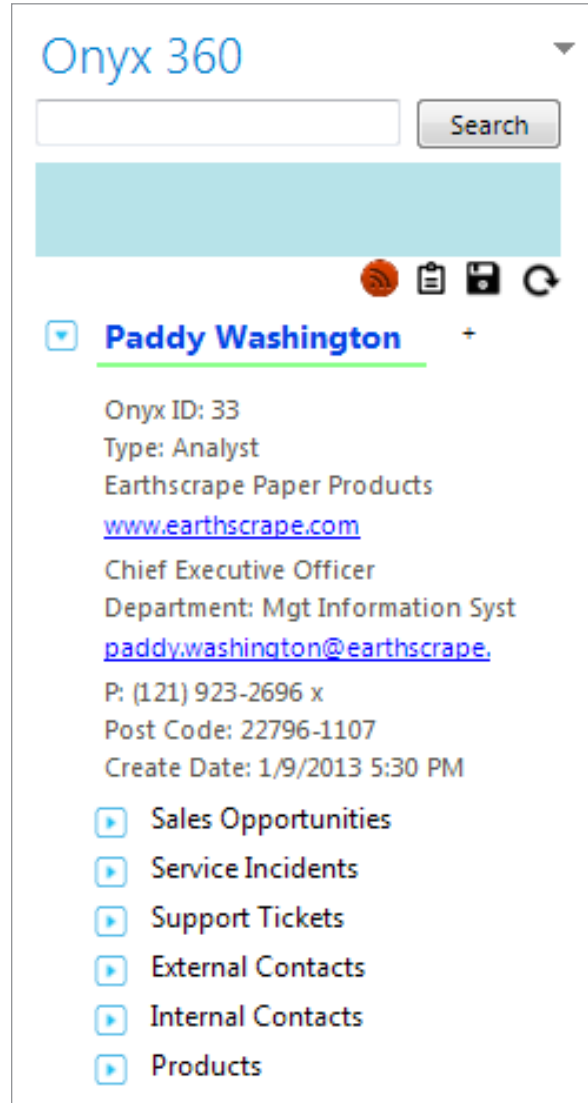
The Onyx 360 panel is completely configurable – so you have all the information that you want and nothing you don't need. The Onyx 360 panel allows configuration of multiple lists under a customer's record to instantly see recent interactions (Sales Opportunities, Service Requests or Support Tickets) with the customer.

Custom Lists: Have a custom list that you'd like to show? Add it to your Onyx 360 view with simple configuration changes. Pull information from custom objects in Onyx or from external data sources to show in the list.

Emails Received: You can also add the received email to the customer's record in Onyx CRM by clicking the save button – or select other customers to add it to via the search feature.

Adding Notes, Attachments & More: Add the email as a work note on a specific Opportunity or save it as an email interaction. Add attachments in the email to records in Onyx. View list of associated internal and external contact relationships in Onyx. Add yourself as an internal contact to a customer record.

The possibilities are endless with Onyx 360!

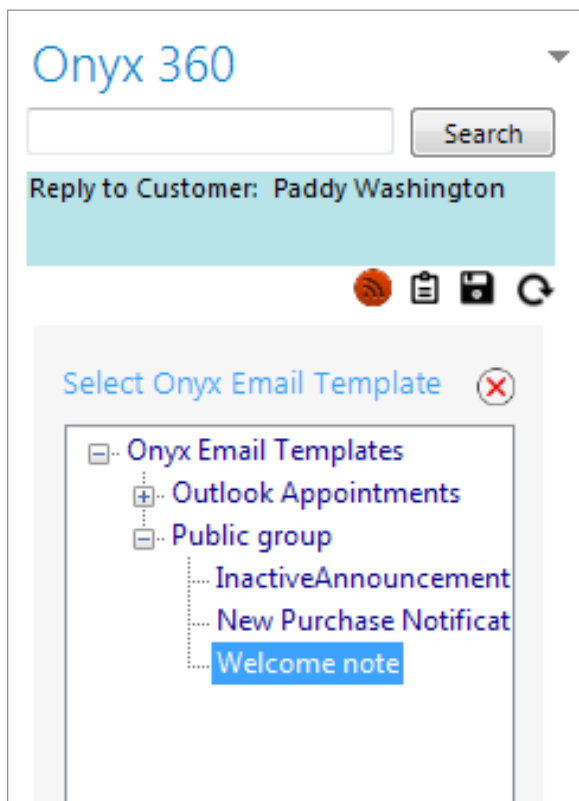


The screenshot displays the Onyx 360 interface. At the top, the title "Onyx 360" is shown in blue. Below the title is a search bar with a "Search" button. A light blue horizontal bar is positioned below the search bar. Underneath this bar are several icons: a red globe, a clipboard, a document with a checkmark, and a refresh symbol. The main content area features a dropdown menu with a blue square icon containing a white checkmark, followed by the name "Paddy Washington" in bold blue text, which is underlined in green. To the right of the name is a plus sign. Below the name, the following information is listed: "Onyx ID: 33", "Type: Analyst", "Earthscrape Paper Products", "www.earthscrape.com", "Chief Executive Officer", "Department: Mgt Information Syst", "paddy.washington@earthscrape.com", "P: (121) 923-2696 x", "Post Code: 22796-1107", and "Create Date: 1/9/2013 5:30 PM". At the bottom of the interface, there is a list of six items, each with a blue square icon containing a white right-pointing triangle: "Sales Opportunities", "Service Incidents", "Support Tickets", "External Contacts", "Internal Contacts", and "Products".

SEND MAIL MERGED EMAILS

Send instant mail merged replies to customers using pre-determined Onyx email templates right from your Outlook.

Using Onyx 360, you select an email template configured in Onyx to automatically merge the customer's information. The email correspondence is automatically saved in Onyx for the customer.



TRACK YOUR EMAIL CONVERSATION

Automatically have Onyx 360 save all email interactions on a particular email thread with a simple click of a button.

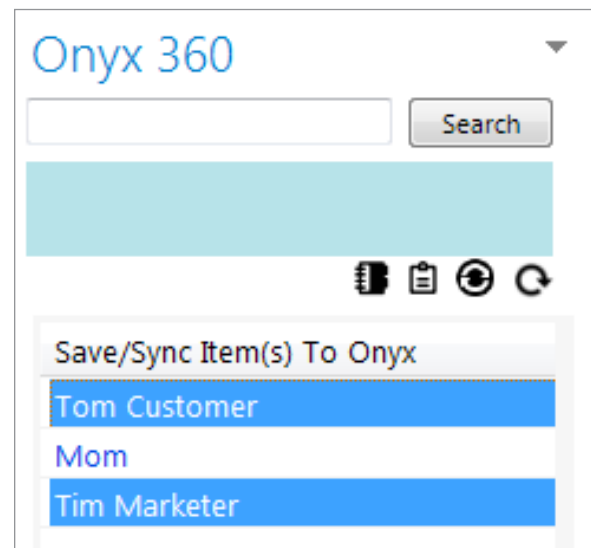
Onyx 360 automatically saves all emails sent and received on the thread when you click on the icon to "Subscribe to Email Conversation."

Never miss to save a customer email or reply in your Onyx CRM!

CONVERT YOUR OUTLOOK CONTACTS TO CUSTOMERS IN ONYX CRM

Using the Onyx 360 Outlook side-panel, you can easily import contacts from your Outlook Address Book into your Onyx CRM.

Bulk import the contacts you've collected at a trade show or networking event and create them as leads in your Onyx CRM system.



Import only the contacts you want to add to Onyx CRM.

On-demand contact synchronization allows you to keep your personal contacts in your Outlook and keep them out of Onyx.

Onyx 360 also lets you download selected customer records from Onyx to your Outlook Address Book so you can take them with you on your Exchange synchronized mobile device.

CREATE SALES OPPORTUNITIES INSTANTLY FROM EMAILS

Instantly create Sales Opportunities, Service Cases or Support Requests directly from an email. The subject line from the email is automatically inserted as the case description.

The record created is automatically added to the customer. You can also add the email text to the created case/opportunity record with a few clicks.

The screenshot shows the Onyx 360 Outlook side-panel. At the top, there is a search bar and a 'Search' button. Below this, a teal notification bar states: "Creating Sales Opportunity for customer: Paddy Washington". Underneath the notification are icons for RSS, clipboard, save, and refresh. The main content area is titled "Create Incident" and contains a "Description *" field with the text "Additional licenses", a "Type *" dropdown menu set to "Large Account", and a "Product *" field.

SAVE SCHEDULED MEETINGS AS ONYX APPOINTMENTS

With the Onyx 360 Outlook side-panel, you can schedule meetings with customers from your Outlook Calendar and automatically have Onyx 360 add it as an appointment in Onyx CRM.

The screenshot shows the Onyx 360 Outlook side-panel. At the top, there is a search bar and a 'Search' button. Below this, a teal notification bar states: "Appointment will be saved in Onyx after it is sent". Underneath the notification are icons for clipboard, close, and refresh. The main content area shows a user profile for "Paddy Washington" with a plus sign to the right. Below the name, the following details are listed: "Onyx ID: 33", "Type: Analyst", "Earthscrape Paper Products", "www.earthscrape.com", and "Chief Executive Officer".

See the user adoption for your Onyx CRM increase dramatically with the Onyx 360 for Outlook!

Interested in finding more about Onyx 360? Contact your Account Executive today.



More than 5,000 customers around the world rely on Aptean to give them a competitive edge. By providing innovative, industry-driven enterprise application software, Aptean helps businesses to satisfy their customers, operate more efficiently, and stay at the forefront of their industry.

For more information, visit: www.aptean.com