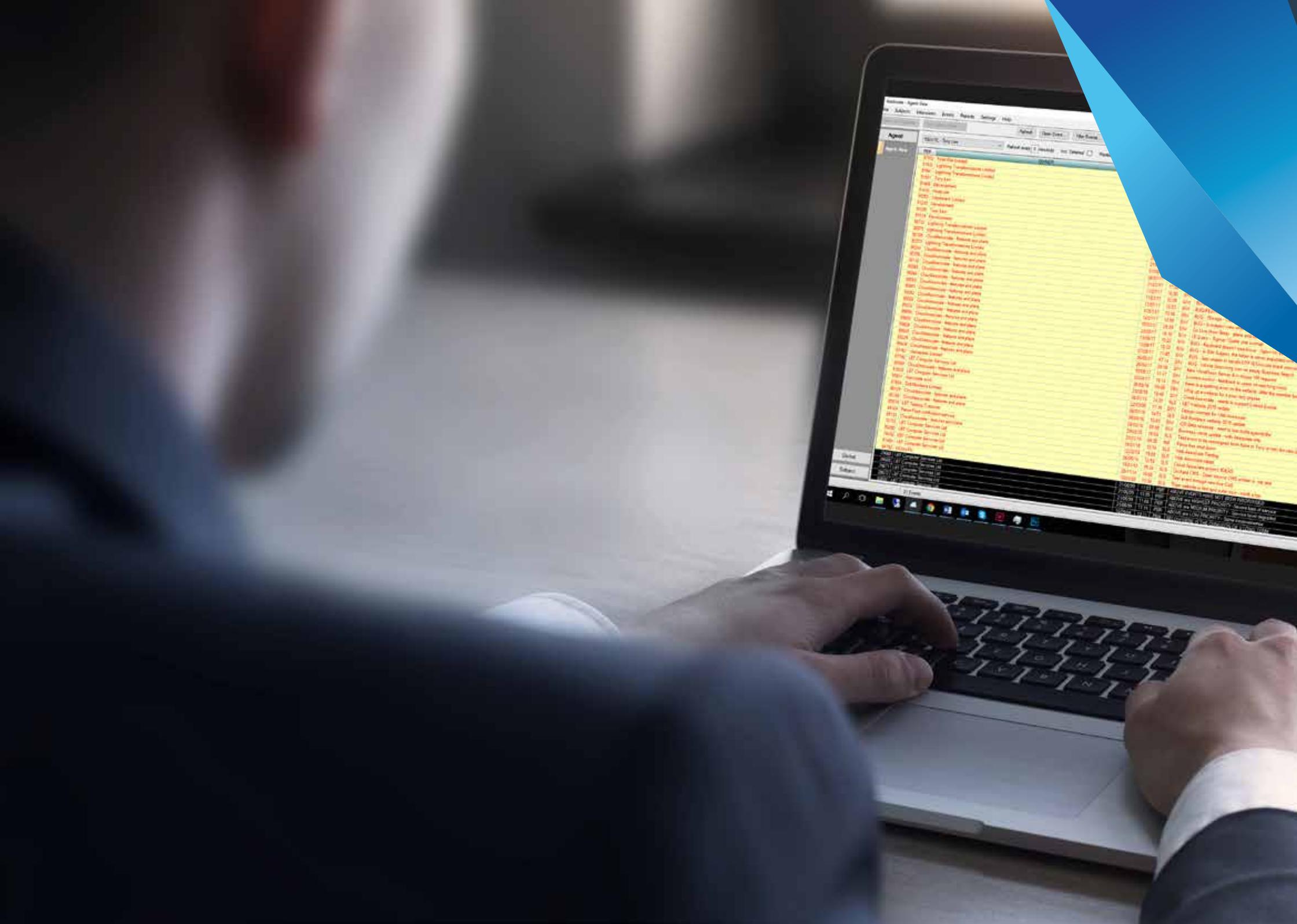




# ASSOCIATE

Once you have it, you'll wonder how you managed without IT!



Agreed	Date	Description	Amount	Status
2010	2010-01-01	Payment for services	1000.00	Completed
2010	2010-01-15	Payment for services	1000.00	Completed
2010	2010-02-01	Payment for services	1000.00	Completed
2010	2010-02-15	Payment for services	1000.00	Completed
2010	2010-03-01	Payment for services	1000.00	Completed
2010	2010-03-15	Payment for services	1000.00	Completed
2010	2010-04-01	Payment for services	1000.00	Completed
2010	2010-04-15	Payment for services	1000.00	Completed
2010	2010-05-01	Payment for services	1000.00	Completed
2010	2010-05-15	Payment for services	1000.00	Completed
2010	2010-06-01	Payment for services	1000.00	Completed
2010	2010-06-15	Payment for services	1000.00	Completed
2010	2010-07-01	Payment for services	1000.00	Completed
2010	2010-07-15	Payment for services	1000.00	Completed
2010	2010-08-01	Payment for services	1000.00	Completed
2010	2010-08-15	Payment for services	1000.00	Completed
2010	2010-09-01	Payment for services	1000.00	Completed
2010	2010-09-15	Payment for services	1000.00	Completed
2010	2010-10-01	Payment for services	1000.00	Completed
2010	2010-10-15	Payment for services	1000.00	Completed
2010	2010-11-01	Payment for services	1000.00	Completed
2010	2010-11-15	Payment for services	1000.00	Completed
2010	2010-12-01	Payment for services	1000.00	Completed
2010	2010-12-15	Payment for services	1000.00	Completed

# WHAT IS ASSOCIATE?

Associate is an exciting revision to the traditional Customer Relationship Management approach, encompassing well known Sales/Marketing aspects with integration of the other departments that make up your organisation.

Most companies have more than just a Sales department, each of which have different requirements for the data they handle. Consequently, each department uses different packages to meet the variations in their data handling requirements.

Ideally an organisation wants to have centralised data, with each department having access/control over the detail that concerns them, but with the ability to easily exchange pertinent information with other departments.

Associate helps you to achieve this through its ability to hold centralised data, accessible by all departments of your business, with the ability to tailor input/control to relevant departments but with the ability for ready exchange and record update as required.

The overall result when you use Associate is an increase in business efficiency and greater flexibility in response to issues and activities.

# ASSOCIATE FOR BUSINESS

Associate is much more than just a CRM package.

Whatever the size of your business, using Associate enables you to bring all aspects of your company together, in one application.

Manage your Sales, Marketing and Customer Service in traditional CRM style. Track orders and correspondence from suppliers with ease and attach relevant documentation, including emails.

Complete invoicing or invoices for Customers Sales and link, with optional interface, to your accounts package\* for quick and seamless accounting.

Associate is ideal for your employees to complete time sheets and, via its centralised organisational diary, see who is doing what and where in a simple to use interface.

\* SAGE ACCOUNTS - OTHERS AVAILABLE ON REQUEST

## CUSTOMISATION

Associate can even be customised to integrate with your existing software, with bespoke tailoring available upon request.





## ASSOCIATE FOR YOU

In addition to Associate CRM for Business, we have a Personal version too, which is ideal for organising your personal life.

Store personal documents, insurance policies, certificates, notes, receipts or product warranties, memos, or personal information, photos or details you may take during your day.

The personal version is available as an iOS app and is completely separate from Associate for Business.

With Personal Associate, your data is held securely in dedicated Cloud space, accessible only by yourself, meaning you can take it with you throughout your day, having all of your information at your fingertips.

# ADDITIONAL FEATURES

Associate comes with additional features to integrate into your business organisation:



## OUTLOOK

Store copies of your email documents, as Associate can be integrated with Microsoft Outlook.



## ACCOUNTS

Transfer records of orders and invoices created within Associate to your accounts package via Associate integration.



## REPORTING

Generate reports and charts of your data whether standard reports of performance and usage, or more bespoke to the business you run. Associate can produce reports for all of the data you hold.



## TIME SHEETS

Analyse the time your users spend per issue/customer within Associate, track your field operatives working day activities. Associate contains built-in time sheet functionality for both management and reporting to enhance the performance of your business.



## CUSTOMISATION

Associate offers the ability to define different field/layouts per type of activity being recorded, so you can efficiently capture your key business data.



## SECURITY

Protect your more sensitive company data from junior staff/departments.

With Associate controls, data access is via different levels to ensure that only the designated users or department can interact only with the relevant business information.



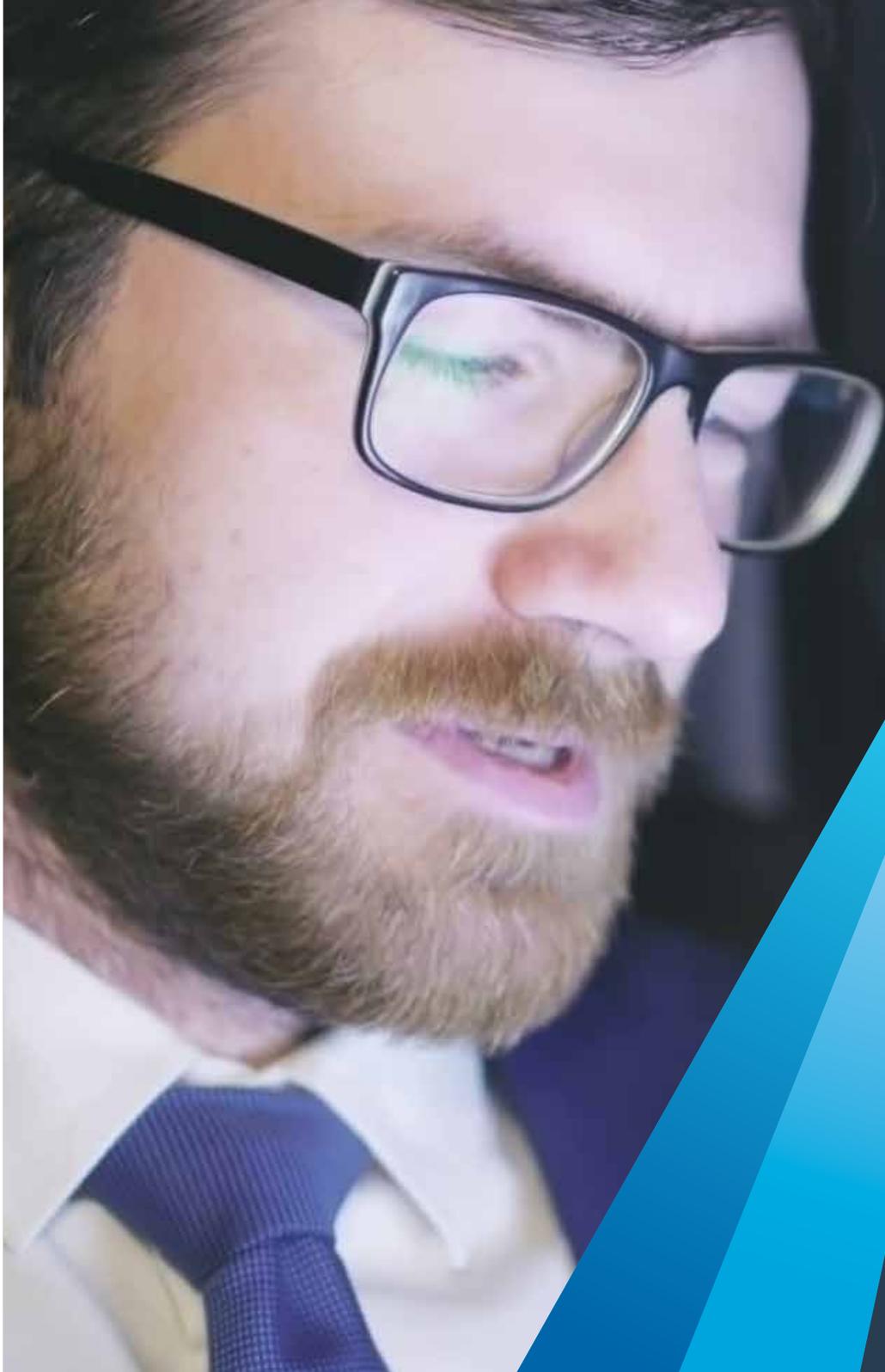
## JOURNAL

Quickly review your business activity, on a per Customer/Supplier basis, via a collated listing of gathered information.



## SEARCH

Perform text based searching of attached content, documents or email, for both active and historic records, to tap into the wealth of knowledge held within your business data.



So. Associate is a CRM at its core. But what makes it unique?

In short, flexibility! We have designed and refined Associate over the years to deliver unrivalled flexibility for a CRM package, all in an easy to use interface that works for everyone.

To achieve this, there is some key terminology to get to grips with. Once mastered, these terms make the Associate experience a very powerful and streamlined one, allowing you to produce results... Fast.

# WHAT MAKES ASSOCIATE DIFFERENT?

# KEY TERMINOLOGY

## AGENT

Any assigned user of Associate.

Every Agent is assigned their own login to Associate, to use throughout the working environment.

## GROUP

As you have departments and roles, you can create Groups for your Agents in Associate, to manage access and different levels of privilege to your data.

## DOMAIN

Keep your business records in a structure that relate to you, by filing your different business activities under easy organisation units we call Domains, for faster access.

## SUBJECT

Your Customers, Suppliers, Internal Departments and business organisations you deal with, these are what we call Subjects. Store everything you hold value to your business for each relationship, all your documents, emails, files and contacts.

## EVENT

Your individual activities with your business Subjects, these are what we call Events, as a means of recording the sequence and detail of each of the interactions you/your Agents handle during your business day. Store your notes, files, documents, images, emails relevant to each activity.

# SECURITY

Your data is your business lifeblood, so security of this is key to your business.

Associate holds its data within an industry standard Microsoft SQL Server database, leveraging the security and control it provides.

This database is held on your premises on a server of your choosing in accordance with security policies you have for your IT infrastructure.

If you're starting afresh and don't have such in place, this isn't a problem as our reseller, LBT Computer & Internet Services Ltd, has the professional expertise to assist in both order and installation of any required IT equipment (large or small).

Although having an on-premise server secures your data from external concern, Associate provides its own security from within for the setup of its Agents and Groups.

You have full control over what data is seen by which employees who use Associate.



urity

You can define levels of access based on User, their Group or certain recorded information types you choose to create.

So, for example, Sales can be excluded from HR information. They won't see them anywhere in the system.

The same can be done for any defined event type against any chosen group.

As a further level of control, if you don't want your junior staff to be able to change what has already been recorded in a log (perhaps a support oriented log, handled by junior Customer Service staff), you can restrict them to be able to add to but not delete existing content. This is what we term assigning "append only" permission.

For those who you deem should have read-only access to certain event types, again this is possible with definition of "read-only" access.

All the configuration of this security control is done via an administrative control application, to separate security management from day-to-day Associate use.

# THE ASSOCIATE PRODUCT SUITE

Associate is more than a single product for us.

It is the progression of a product that has been 23 years in the making, from a time when SQL databases were not the norm within business, but the exception.

A lot has progressed during that time, as has our product, which today runs on Windows 10 against the latest generation of SQL Server product.

But the journey has only just begun.

We now see the emergence of Cloud technology, breaking the boundary between your work and the outside world. To this end Associate is also changing.

We now offer, by way of a free taster of the future, a personal version for iOS running on Cloud technology. This is a limited version of the Associate package, specific for individual use.

It supports storage of your personal notes, documents, activities, contacts, reminders with integrated scheduling. All the key aspects from Associate that you as an individual need in this modern age.

Coming soon is Associate for Mobile, the business user companion app that can link into your Associate for Business system. Access your key information out in the field, have your data at your fingertips without need to call into the office. Create and update your events on the road, save key information to clinch that new business deal.



## ASSOCIATE CORE

Our flagship product! The on-premise desktop app that is 23 years in the making. Available right now.



## ASSOCIATE FOR CLOUD

Launching the flagship into the future. Associate Core will soon run via the cloud using our specially designed infrastructure.



## ASSOCIATE FOR MOBILE

To accompany Associate for Cloud. Access your company data on the move, with Associate for Mobile.

Connect securely to your company data from anywhere in the world using your iOS device, update and interact with your records as if at your office desk.

# DON'T JUST TAKE OUR WORD FOR IT

What do our customers say about Associate?



*“Before implementing LBT’s “Associate” CRM application, Kingfisher Environmental Services Ltd was a successful small business that was starting to have difficulty maintaining its early growth. Our administrative staff were struggling to maintain control of the scheduling of visits of our engineers to inspect, sample, and test commercial water systems including swimming pools, spas, cooling towers etc. The more so, because of the burden of arranging the scientific tests and certifying the results to our clients. Getting new business wasn’t a problem, but handling it was.*

*Fourteen years on, we have more clients, more engineers, and more tests. However, we also have less central administrative staff and a better service to our customers. We are now the UK’s leading testers of swimming pools testing over 1,000 pools and spas per month with offices in Hertfordshire, Swindon, Birkenhead, Scotland, Ireland and Devon all linked via the ‘Associate’ application.*

*Without LBT’s Associate, we wouldn’t be where we are today!”*

*Owen Davies, Owner, Kingfisher Environmental Services Ltd*



*"We are a magazine publishers, producing a monthly magazine for radiology professionals. We needed a way to manage communications with our suppliers and track campaigns with advertisers but also manage our reader base.*

*We looked at many of the applications available on the market that achieved part of what our business needed, but Associate offered us the ability to manage all of our business needs in one package.*

*Over the years, as our business has grown and business needs have changed, so have our demands of Associate. But thanks to the ability to bespoke parts of the system, or have entirely new parts added. Associate has grown with us and into an invaluable part of our day-to-day business."*

*Mechel Roberts, Managing director, Rad Magazine*



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