JunariCRM+

Powerful, simple to use, affordable, and
fully tailorable systems to make your business better

Created, maintained, and supported by

Junari

Junari – from the Japanese phrase representing honour, responsibility
and a sense of direction in the corporate world

Please email info@junari.com if you need a printer friendly
version of this document which excludes the background colour

1 Overview

This document provides information about Junari Ltd and JunariCRM+, covering some of the *out-of-the-box* features, some *optional* features that you can request to be added, available *integrations* with other systems, and additional free and chargeable features and services available to you.

Should you decide to get maximum benefits from JunariCRM+ by electing for a customised version, information specific to your requirements will be covered separately in a proposal document created specifically for your business.

2 About Junari Ltd

Junari has been successfully providing bespoke CRM-based business systems since 2006. At the core of most of our systems is JunariCRM+

The name *Junari* reflects our company ethos, taken from a Japanese phrase meaning "*your chosen path*", and having connotations of honour, responsibility and a sense of direction.

We are experts in tailored business software, helping you increase teamwork and visibility of critical information, improve process flow and efficiency, reduce errors and duplications of effort, aid lead generation and increase sales, improve customer service, and bring your systems together.
Many of our team have been involved in software project management, integration, design, development, training, and support since the 1990's.

We pride ourselves in taking time to listen to you and work with you to find the best fit for your needs and your budget. We work with you to evolve and future-proof your JunariCRM+ as your market and your customers' needs change.

Junari learns *your* business so that JunariCRM+ works for *you*

See some of our client testimonials, case studies, and client feedback at:
https://www.junaricrmplus.com/testimonials

A comfortable and safe journey

A good choice of business software should form a solid foundation from which you can build your business for years, and even decades. You need assurance that your investment of time and money into a choice of supplier and product is a sensible and safe one.

Successful implementation of such systems is imperative to your comfort, understanding and most effective use, and greatly enhances the all-important *user buy-in* that your business case is based upon. Junari's understanding of the pressures and difficulties arising from change are our key drivers for creating JunariCRM+ as it is.

We have held many clients' hands through their mission-critical projects, so you can be assured you are in safe hands with Junari. We take a great deal of care in ensuring our systems fulfil your present and future requirements and will do everything we can to make sure they work well from day one.

3 JunariCRM^{+} Overview

3.1 Well-established Platform

The core of JunariCRM^{+} is based on a globally used platform, with an enterprise database and application layer, providing you with maximum confidence about security, reliability and usability as detailed in the following sections.

3.2 First Class Hosting for reliability

JunariCRM^{+} is safely and securely hosted fully in the cloud by our UK hosting partner, promising 100% network availability and more than 99.5% server uptime which they have consistently exceeded.

3.3 Security and permissions

Security of your data and documents is our priority. All hosted servers are UK-based and hosted by one of the most reputable UK specialist suppliers, in wholly-owned ISO-accredited data centres, and built using only the very best technology including SGI, Cisco and VMware – guaranteeing you a flexible, scalable, first class service.

Junari's systems are so secure that not even Junari and full-CRM access staff in your organisation have access to your CRM password – if you lose it, it must be reset. This prevents unauthorised, non-auditable activities.

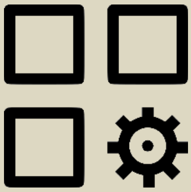
All passwords are protected with industry-standard encryption, and all data –including login credentials – is always transmitted securely over 256-bit HTTPS with an externally signed SSL certificate.

Additionally, you can setup users' detailed access permissions per account or per department.

3.4 Backups and updates

Your data is backed-up every night or as appropriate for your operational needs, giving you peace of mind, and your JunariCRM^{+} system will get at least eight feature updates per year.

4 Customisations to JunariCRM^{+}



This document describes some of the out-of-the-box features of JunariCRM^{+}, however we understand that every business is different, and it is often those differences that gives *your* business the edge.

Junari is able to customise and add to almost every aspect of your JunariCRM^{+} to cater for your needs, and we can integrate with most of your existing systems too. We provide our clients with many bespoke features, such as, but not limited to: grant management; charity and fundraising management including gift-aid exports; insurance policies; travel itineraries; occupational health; fire and safety training; IT training; room bookings; marine construction bidding and job management; software sales; event management; recording of mental and physical health cases.

Additionally, any users with relevant system permissions may customise many parts of the system directly, including dropdown lists, tags, email templates, calendar and task categories, sales and order types, payment terms, nominal codes, your business' departments, products, pricing, stock locations, reports, and more.

5 JunariCRM^{+} Features, Functionality and Integrations

5.1 Importing Data

Your business can use our powerful but simple Data Importer to pull-in company and contact data from CSV files. Companies and Contacts can easily be automatically linked in the CRM during import, from single or multiple files sources.

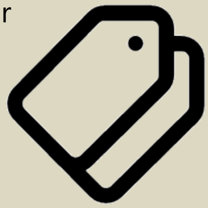
Most systems, including Excel, Access, and other databases and CRMs allow you to export data, and we can help with more complex, custom imports, potentially saving you weeks of manual data entry.

5.2 Storing information on Leads, Customers, Suppliers, and more

The core of JunariCRM^{+} is its address book, allowing you to store detailed information about companies (organisations), contacts (people) and the relationship between them, e.g. John Smith being the Owner of Smiths Ltd with email address john@smiths.com, and also a Governor of the local school with a separate email address john@theschool.com.

5.2.1 Tagging your Company and Contact records

JunariCRM^{+} allows you to apply one or more *Tags* to company and contact records to indicate to which categories they belong. Filter to show only contacts or companies with a specific Tag, for purposes such as adding to Target Lists for marketing, as described elsewhere in this document. For example, a client may also be a supplier, or you may wish to target all Potential Leads in a specific geographic area.



You define your own tags in JunariCRM^{+} and indicate whether each tag is to be made available to contacts only, companies only, or both contacts and companies.

5.2.2 Storing and accessing Documents and other related information

JunariCRM+ allows you to store documents of any type against contact, company and most other records. You are also able to store details of all communications against companies and contacts, and click-through to access any record related to that contact or company based on which modules you have available, and including but not limited to: Sales Opportunities, Quotes, Orders, Invoices, Credit Notes, Emails, Meetings and Tasks.

5.3 Emails

5.3.1 Sending emails from the CRM and using Email Templates

JunariCRM+ allows you to compose and send emails from scratch or use user-defined email templates, with one or more optional attachments. Emails can also be sent in bulk, immediately or scheduled, and logged against the appropriate CRM records.

5.3.2 Using FileIt for filing emails sent from outside the CRM

JunariCRM+ uses a system called FileIt to allow you to automatically file emails against contacts and companies by copying or forwarding them to an email address.

An example of this would be sending a message from your email software, such as Gmail or Outlook - to john@smiths.com, and Bcc'ing that email to mybusinessname.fileit@gmail.com, instructing the CRM to automatically find the contact with that email address and file the email against their record.

FileIt is an optional feature which can be setup for any JunariCRM+ user **free of charge**.

5.3.3 Using the Junari Plugin to file emails from within Microsoft Outlook

Junari can provide a JunariCRM+ specific Microsoft Outlook Plugin, enabling you to file emails against existing Contact or Company CRM records directly from within Outlook.

These features may be provided upon request for a setup and/or ongoing fee.

5.3.4 Integrating contact lists in the CRM with Mailchimp lists

Junari can make available to you, functionality to link and synchronise *CRM Target Lists* of your choice, with *Mailchimp Lists* of your choice from your MailChimp account.

An initial synchronisation sends all chosen email address from the CRM into MailChimp, and subsequent sync's update unsubscribes marked in the CRM, and recipients who have unsubscribed – ensuring you stay GDPR compliant across your systems.

Upon request, Junari can send a step-by-step guide explaining to you how to obtain certain information to provide to us so we can link the CRM to your MailChimp account.

These features may be provided upon request for a setup and/or ongoing fee.

5.4 Highly customisable, personal Dashboards

From almost any part of JunariCRM+, it is possible to "Pin" multiple lists of information to your main dashboard or dedicated Sales dashboard, making this critical information available whenever you first log in, and easily accessible at any other time. Setting up Dashboards effectively can create effective workflows across departments throughout all functions of your business.

Some examples of how this can be useful for your overview and for workflow:

- For all staff:
    - Pending tasks assigned to you
    - Pending tasks assigned by you
- For your Sales and Management teams:
    - All Sales Enquiries requiring a Quote, worth more than £x
    - All Won Sales, grouped by Salesperson
    - All Leads in one or more address areas
- For your Account Management team:
    - Outstanding complaints
- For your HR team:
    - All staff with training requirements due for renewal within 30 days
    - All HR policies and procedures
    - Employee Absences, grouped by Employee or Type
    - Annual leave requests to approve
    - Accidents and Incidents log entries
- For your Finance team:
    - All Finance procedures
    - Timesheet entries
- For your other teams:
    - All outstanding projects

5.5 Marketing and Lead Management

5.5.1 Selecting Target audiences for your marketing communications

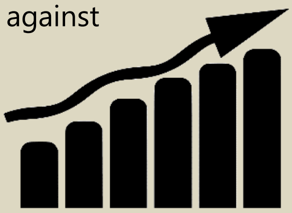
JunariCRM+ provides rich functionality to assist with both marketing and lead generation. Once your CRM is populated accordingly, you can target communications in many ways, such as:

- Tags
    - As described in section 5.2.1
- Industry
- Turnover
- Number of employees
- Source
    - The source of companies and contacts - i.e. where you first came across them
- Geographic region – and more.

Filtering in these listed ways, you are able to slice and dice your data in various ways to put it into one or more target lists. From a target list it is possible to:

- Produce multiple letters and documents en masse, with all of the necessary name and address details populated for you
- Send emails en masse, using Email Templates stored in the system
- Push emails from a CRM Target List into a MailChimp List and keep both lists in sync
- Create an Outbound Call List, e.g. for telemarketing purposes

5.6 Sales Enquiries (Opportunities), and Sales Forecasts



Details of your sales enquiries / opportunities can be captured within JunariCRM$^+$ against the company record or person enquiring.

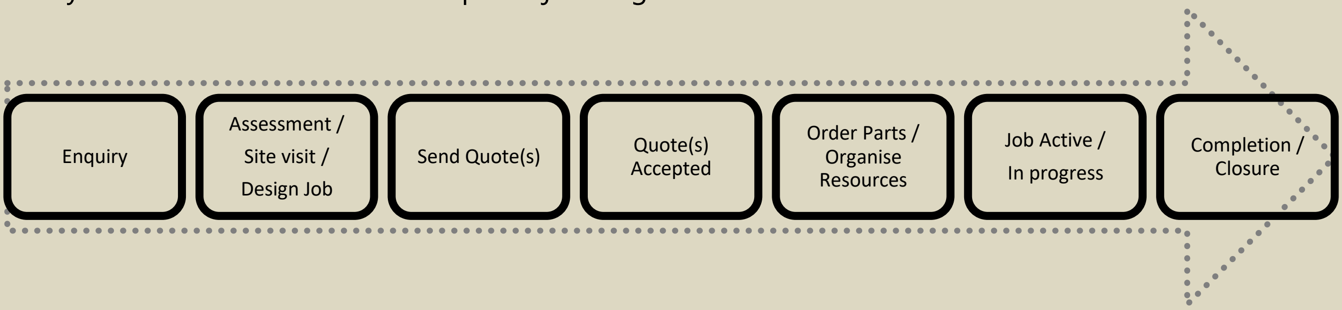
As an enquiry / opportunity passes through stages (such as New, Quote Sent etc.), you can update the Value of the sale and Probability of winning it so the CRM can provide you with an adjusted value (Value x Probability). This can then easily be grouped by Enquiry Stage and Month, giving you an on-screen Sales Forecast within just a few clicks.

5.7 Sales Orders / Jobs

JunariCRM$^+$ supports renaming modules, so you can specify whether it should show Orders, Jobs, or another term to mirror your preferred business terminology.

Sales Orders / Jobs functionality enables you to directly enter a job or convert the relevant details of an accepted quote into a job, and to track it through a workflow to match your process until successful completion.

Junari can set up a workflow to enable even easier use and visibility of Jobs in specific stages relevant to how your business works. An example of job stages would be:



Quotes, Orders, Purchase Orders and Invoices, as well as activities such as meetings, tasks, and emails - can be linked to and tracked from within each Job record. Jobs are easily visible from within the Company record to which they relate, and it is possible to sort, filter and group by all key job details, such as the Type, Value, Owner, Job Stage, Location etc.

5.8 Purchase Order Processing (POP), and Purchasing Budgets

5.8.1 Overview

The POP features of JunariCRM+ allow you to raise and track both standalone orders and purchases against sales, assign POs to a supplier.

POs can be submitted for approval and then once approved, marked as Sent to Supplier, tracked for received items by setting the status to Part Received or Received, set with a required delivery date, and marked as "In Dispute" at any time.

All POs, or only those at a set status directly can be pinned to your personal CRM dashboard for quick and easy visibility, e.g. the Purchasing Manager may benefit most from seeing all POs at a status of "Submitted for Approval", while those employees ordering items would benefit from seeing all approved POs, either for all or individual departments.

Junari can provide you with a PO template for generating documents, and if necessary, customise such a template in line with your business' requirements.

Alongside quotes, orders, and invoices, the POP features of the CRM can support businesses without dedicated accounting software, and if you do have Sage 50 or Xero then you can integrate directly with the CRM.

5.8.2 Purchasing Budgets

JunariCRM+ allows you to setup multiple custom budgets, such as "IT spending", "Office Supplies", "General Stock", and optionally set a budget start and/or end date, a department such as Reception, I.T., Warehouse, and a customer. POs can be added and then assigned to a budget or added directly from within a budget.

Easily view the total spend allocated to existing POs, the remaining budget, and all POs assigned to that budget, and pin key information on budgets to your personal CRM dashboard.

5.8.3 Purchase Orders for Sales Order Fulfillment

Convert all or part of any open sales order into one or more POs for forwarding to the necessary supplier(s) and to help with tracking, e.g. ordering parts for resale or as part of a bill of materials. See all Purchase Orders

5.8.4 Standalone Purchase Orders

Raise standalone POs for internal supplies such as stationary, furniture and other office supplies, or for when stock requires replenishing.

5.8.5 Tracking items to order or produce

JunariCRM+ uses information from your sales orders to make it easy to list which items are required for ordering in, ordering directly to customer, or for production.

5.9 Invoicing and Credit Notes

JunariCRM+ allows you to raise Invoices from Orders, or directly from a Company record, and print or email them to the customer from within the system. A default template exists for the presentation of invoices, but this can be altered by you as required to match your business' corporate branding, and we can also setup a Pro Forma invoice template for you to use upon request.

Invoices in JunariCRM+ can be marked as paid or part-paid, and there are various methods available to assist with credit control. It is also possible to raise credit notes from within the system.

Many customers choose the option for invoices to be raised within JunariCRM+ and be pushed through to the appropriate ledgers of your Sage 50 or Xero system.

5.10 Sage 50 Integration

5.10.1 Customers, Invoices and Credit Notes Integration with Sage 50

Junari can setup integration between JunariCRM+ and your instance of Sage 50, so that customers, invoices and credits can be automatically posted into Sage 50 and payments against those invoices can be retrieved, mitigating risk of error, and removing the need to spend time doubling-up on entering data. Additionally, if any customer information is changed in your JunariCRM+, those changes can be pushed into Sage 50.

JunariCRM+ can automatically pull through high-level information from Sage 50 either every 4 hours, or you can force this by clicking the refresh info button from within a JunariCRM+ customer record.

Default nominal codes and payment terms can be set in JunariCRM+ for all customers and suppliers, against individual customer records, and against individual invoices.

Invoices and POs can be raised within JunariCRM+ and set to push directly into your Sage 50 instance.

5.10.2 Purchase Order Integration with Sage 50

JunariCRM+'s integration features for POs with Sage 50 currently provide the following functionality:

- The Sage Purchase Order module allows POs created in JunariCRM+ to be transferred into Sage.
- POs are created in Sage once the PO in JunariCRM+ is confirmed
- Sage is used as the source of Purchase Order numbers, to ensure there are no clashes.
- The POs created in Sage are created as *Unposted*, so they can be reviewed in Sage prior to posting
- Notes:
    - Sage 50 and JunariCRM+ do not at this time synchronise products or their corresponding pricing
    - PO lines are created in Sage as "S1" (special item) lines, and the item description from JunariCRM+ is then entered as the Description text.
    - Purchase Nominals and Tax Codes must be configured manually in both systems. This has the advantage that only relevant codes will be available to users of JunariCRM+
    - Purchase Orders created manually in Sage are not downloaded into JunariCRM+

5.11 Xero Integration with our official Add-On partnership accreditation

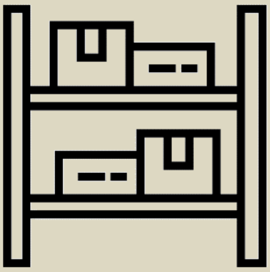
Junari can setup integration between JunariCRM+ and your instance of Xero, so that customers, invoices and credits can be automatically posted into Xero and payments against those invoices can be retrieved, mitigating risk of error, and removing the need to spend time doubling-up on entering data. Additionally, if any customer information is changed in your JunariCRM+, those changes can be pushed into Xero.

JunariCRM+ can automatically pull through high-level information from Xero either every 4 hours, or you can force this by clicking the refresh info button from within a JunariCRM+ customer record.

Default nominal codes and payment terms can be set in JunariCRM+ for all customers and suppliers, against individual customer records, and against individual invoices.

Invoices and Purchase Orders can be raised within JunariCRM+ and set to push directly into your instance of Xero.

5.12 Stock management



JunariCRM+ allows you to create and maintain multiple stock locations, for example 'Warehouse 1' and 'Warehouse 2', associate stock items with a stock location, and manually adjust or move the stock while specifying an appropriate reason, i.e. "fulfil order O1234/1", or "Stock Take".

- Notes:
    - JunariCRM+ provides no specific stock financial valuation calculations, such as LIFO, LILO, FILO, FIFO - stock is valued at the current price of the products held in stock at any time.

5.13 Reporting

JunariCRM+ provides very powerful reporting, allowing users with the appropriate permissions to create custom reports by:

- Defining columns to be displayed
- Filtering rows by one or more settings, or by batches of settings
- Setting one or more fields to sort by
- Setting up summaries, such as Sum, Average, Count etc.

Where custom reports are to be created for your business, your proposal will outline these, and the Requirements Gathering stage will capture the details.

5.14 Document Templates

Templates are available for most areas of JunariCRM+, and can be created by you or Junari, enabling you to generate Documents formatted specifically for your business, such as:

- Quotes
- Invoices
- Letters
- Customer Printouts
- Job Details

Document Templates can include your company logo, and pull information from the CRM, individually or en masse, e.g. for printing a Job Sheet for one customer, or a letter to 100 customers.

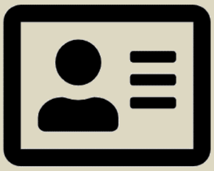
5.15 Web Portals and Online Payments

Junari is able to create a custom, secure Web Portal for your organisation to read from and write to your JunariCRM+. A Web Portal can read from and / or write to your CRM, optionally require login (including Captcha), and can be made available to the public or to a restricted audience such as: staff; clients; suppliers.

Some examples of Web Portals:

- General Enquiry Portal
  - Allowing anyone to make a sales enquiry or general information request and ask for a call-back.
- Clients Portal
  - Allowing only clients to login to view, add or change their enquiries, view orders placed, and check outstanding orders.
- Members Portal
  - Allowing only members to login to view, add and edit placed / outstanding orders.
- Funding Application Portal
  - Allowing anyone to log applications for grants or funding.

5.16 Memberships Management



JunariCRM+ offers Membership Management features, including support for multiple membership types and their associated prices, allowing each contact record to have one or more membership records associated with them.

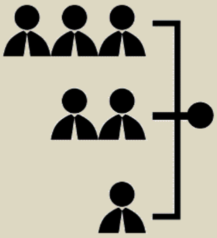
5.17 Customer Service

JunariCRM+ supports your Customer Service team by storing details on contracts and agreements, capturing cases and incidents where work needs to be done, tracking customer complaints, product or software defects etc, and recording time spent against a contract, or a specific case or incident.

These features may be provided upon request for a setup and/or ongoing fee.

5.18 Human Resources and Employee Management

JunariCRM+ supports many of the HR activities undertaken by most businesses to manage their teams effectively and comply with regulations, including:



- Personal details, such as Address, NI number, Next of Kin
- Probation checklists
- Holiday requests and approvals
- Absence / Sick days
- Training Courses required and attended, and Skills achieved
- Accidents and incidents log
- Timesheets
- Role competencies

These features may be provided upon request for a setup and/or ongoing fee.

5.19 Controlled Documents

JunariCRM+'s Controlled Documents features can be used to manage your documents efficiently and correctly, and has proven to be invaluable in reducing non-conformities during audits for accreditations such as ISO 9001.

Documents can be uploaded at a status of *Draft* while being worked on, and then progressed to a status of *Current*, at which time they can then be made visible to the relevant staff. While a document is at *Current* status, it is possible to create a new version at *Draft* while being worked on that and then once approved by an assigned member of the team, automatically archive the last version when the new one becomes current.

These features may be provided upon request for a setup and/or ongoing fee.

5.20 Event Management

JunariCRM+ provides functionality for creating and tracking an unlimited number and type of events, such as training, business fairs, company events, trade shows etc.

You can easily see waiting lists at a glance, manage invitations, attendees and more.

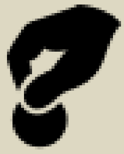
5.21 Project Management

JunariCRM+ provides features to allow you to track an unlimited number of projects, supporting the following:

- Phases
- Tasks and sub-tasks
- Milestones
- Uploaded files related to the project
- Activities linked to the project from other parts of the CRM
    - e.g. emails, calendar appointments and tasks.

These features may be provided upon request for a setup and/or ongoing fee.

5.22 Fundraising

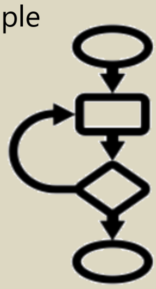


JunariCRM+ allows you to track fundraising efforts and multiple funding sources, supporting your business with functionality to manage your appeals, donations, and collection tins, create ready-formatted Gift Aid exports for HMRC, and more.

These features may be provided upon request for a setup and/or ongoing fee.

5.23 Wiki

- Note: For the purposes of this document, a Wiki is an article describing a topic, or multiple linked topics.



The Wiki area of the CRM provides you with an effective way to store your company Procedures, Processes, Policies and Reference articles. Additionally, you can assign each Wiki to a category, set read-only or no-delete access to Wikis for certain users, assign an Owner to each Wiki and a set a *State* of Archived, Review and Active.

Some useful examples of how to use the Wiki:

- Accounts and Book-keeping procedures
- HR Policies and Procedures, such as New Employee Setup, Interview Questions, Expense Claims, Accident reporting etc.
- Job Descriptions
- Office-specific instructions, such as opening-up and closing-up
- Marketing and Sales Guides
- General Reference, such as Getting Started guides for business-specific systems
- Technical guides specific to your business or industry

Wiki features may be provided free to any businesses paying monthly hosting and support for JunariCRM+ and can be made available upon request. Modifications may be made for a fee, if the out-of-the-box features don't cater for all your business' needs.

5.24 Address lookup

For a nominal setup fee, JunariCRM+ can be linked to Loqate's lookup service to automatically add address details into a record in the system upon selection. This accelerates data entry, reduces the chance of manual errors, and encourages consistency.

Loqate charge a set-up cost and/or price per look-up / click for this service, and your subscription with Loqate will not be linked to Junari, as we are not affiliated with them in any way.

Pricing options and details for Loqate can be found here.

6 Additional Services

It's often worthwhile investing time into your business up-front to gain the best results. Our process to deliver a tailored solution involves multiple steps, including some of the following:

6.1 Requirements Capture

We estimate the number of days of requirement capture business analysis that will be needed in order to fully understand and document your business requirements, and specify in your proposal document, the initial *minimum* and *maximum* number of days and cost required for this.

The output of this stage can be a Specification Document depending on the size and complexity of the project; however, your original Proposal document may instead be used as our implementation guide.

While we of course hope that you'll decide to go ahead and work with us, there will be no obligation for you to continue using our services after the completion of this stage, and any proposal document will be yours to keep.

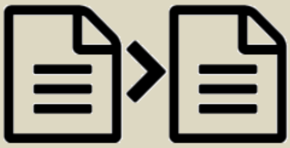
6.2 Training, Initial on-site Configuration, and e-Learning

Training is usually provided to key staff, and sometimes to all staff. It will be agreed where and when (or whether online), such training is to be delivered. Travel and accommodation costs will be confirmed at the time of booking training where appropriate and necessary.

Bespoke e-Learning materials can be created for you if required at additional cost, to train new starters and upskill or refresh existing staff.

6.3 Advanced Data import

You can import Company and Contact information yourself, and JunariCRM+ will use its built-in rules to attempt to link these together for you accordingly, but importing data can often be quite complicated, and you may elect to enlist our services to facilitate this.



During the requirements gathering phase, Junari can determine exactly what information will be pulled, from where and how it will be manipulated (if required), and to where it will be imported and then perform the data import for you.

6.4 Set-up and configuration

Unless specified otherwise in our proposal to you, our set-up fee covers the following items:

- Deployment of a secure cloud-based server instance of the CRM
- Addition of your company's logo
- Initial setup of your users, including: Full name, Login details and permissions based on what you advise us
- Assistance with configuration of drop-down lists during training, or via phone or email
- If required, configuration of an email signature template to be used by all users

6.5 Regular updates

We release regular updates to deliver you functional and usability enhancements, and other minor changes. Periodically, we may send release notes describing such changes and any new features.

6.6 Customer Support by telephone and email

Once live, we will be available to support your system from 09:00 until 17:00 UK time, any UK working day of the year.

Our Service Promise means we acknowledge a problem and endeavour to provide some initial diagnosis within four working hours. We are confident that after you have used areas of JunariCRM+ which are most relevant to you that you will be fully familiar with how it works, but we are available to help you while we are hosting and supporting the system for you.

6.7 Future-proofing your business

In order to maintain your JunariCRM+ in such a way as to match your business' potentially changing business, we can provide you with integrations, customisations and further data import.

Additional services and functionality will be defined, and cost and timescales estimated and agreed with you prior to any work taking place to ensure you remain in control of additional spending.

6.8 Spreading the cost

Let us know if you'd like to spread the cost of implementation or enhancements for your CRM, and we will endeavour to help you find a cost-effective finance solution.

7 Our Agreement - Terms and Conditions

Our terms and conditions are referenced in your proposal document, and can be viewed on our website at any time:

https://www.junaricrmplus.com/junaricrm-client-terms-conditions.html