

# NaverticaPoint 365

Cloud system for effective management of sales, information, documents and supporting business processes

## What is NaverticaPoint 365?

NaverticaPoint 365 is a complex solution for sales, information, document and business process management, developed with latest Microsoft technologies. The solution consists of 7 autonomous and independent modules. Organizations can use all NaverticaPoint 365 modules or choose only those they need.

## Key features of NaverticaPoint

- Complete coverage of sales process
- Advanced opportunity/quote configurator
- Contract management
- Incident management
- Project management
- ISO, Managed documentation
- Meeting minutes

## Advantages of the solution

- E-mail synchronization with Outlook
- Native integration with SharePoint documents
- E-mail alerts
- Responsive design
- Multilingual support
- Native integration with Power BI
- Optional integration with ERP systems

## Who is the solution for?

The solution NaverticaPoint 365 is a specialized cloud solution for commercial, healthcare and public service organizations. It is suitable for both manufacturing and service companies, regardless of their size, industry type and ownership type.



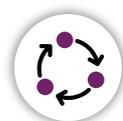
Sharing and rapid cooperation



Access permissions



Dedicated user file storage



Approval process automatization

Microsoft  
Partner

Gold Enterprise Resource Planning  
Gold Data Analytics  
Silver Cloud Platform  
Silver Small and Midmarket Cloud Solutions  
Silver Application Integration

NAVERTICA  
A BETTER BOTTOM LINE



## NaverticaPoint 365 Modules

### Sales Enhanced

Complete coverage of the sales process, from the initial contact with a potential customer, following communication, offer specification, calculation, opportunity qualification, to the project/implementation phase. Includes a central database of customers, contacts, product catalogs, discount mechanisms and connections to the DMS where all the relevant documents are stored.

For more complex calculations, where it is not enough for the sales representative to fill in the items of the future offer by entering parameters - such as product, price per unit, quantity, discount - you can use the graphical configurator. In addition to the product hierarchy, up sell, cross sell, it offers the user the possibility to dynamically load data from the ERP system, for example, and to perform various checks, filtering, and calculations in the background during the calculation creation.

### Sales Configurator

### Contract Management

Contracts can be tied both to the sales phase of the case from which the contract originates, and to the area of support. It is possible to address topics based on the required response time, length of warranty periods and the like. The module also contains a workflow for commenting and approving contracts and, of course, it is possible to save the files in the DMS in the background.

Helpdesk/servicedesk request management module. It allows managed creation of incidents from e-mail or other sources, queue management, management of associated communication synchronized with Exchange/Outlook, incident dispatching, metrics, SLA monitoring and recording based on either system settings or the relevant contract parameters, notification and escalation mechanisms, and of course connectivity to DMS.

### Incident Management

### Project App

An application that is designed for project management, from preparation through implementation to completion or transition to the support phase. Provides the project manager with tools for project management. It assumes that during the business process a contract was concluded between the company and its customer, based on which the project is implemented, and the business phase of the project is covered. The module covers the entire project life cycle.

Module focused on managed documentation. Quality manual, guidelines, instructions, procedures, forms, and other documents and record management. The module covers the complex lifecycle of these documents, from creation, through co-authoring, commenting, approval, to fully automated acquaintance of users with newly issued documents. The application uses the task system as a tool for entering and monitoring work. After starting a workflow, both automated and manual, authorized persons have an overview of who was given what task and how they perform.

### ISOPoint

### Conference Point

A module for conducting meetings and negotiations. The records are structured into three levels: meetings, topics, tasks. Each meeting can have multiple topics and each topic may have one or more tasks. These entities are always common - all meetings have a common storage, the same applies to points and tasks. Therefore, it is possible to display complex reports easily according to the user's wishes. The module also contains functionalities for templates and recurring topics.

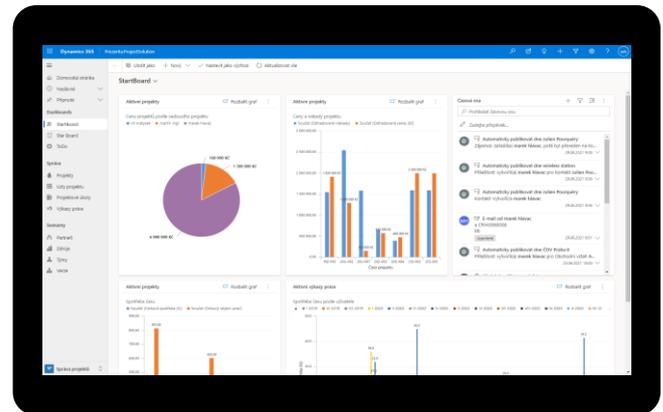
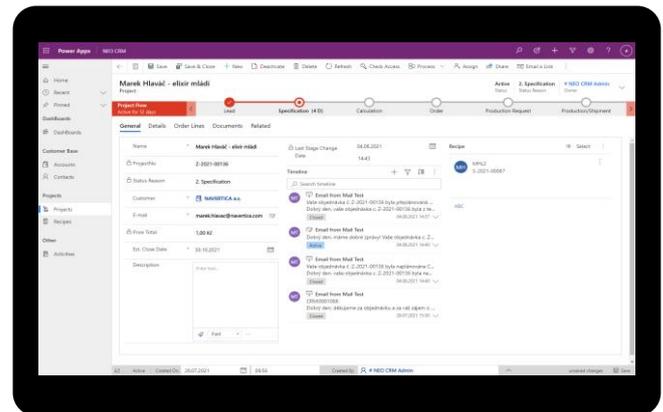


## The core of the solution – Power Apps and SharePoint

The Microsoft Power Apps and SharePoint Online platforms were used to develop the solution. Both platforms excel in the ability to connect to other company systems as well as third-party systems.

**Power Apps** allow creation of applications and offer rich business logic and workflow. They help you change manual processes to digitized ones. The platform also contains customizable, responsible design and can be run in browser or on mobile devices.

**SharePoint Online** provides user-friendly environment for teamwork and team storage for documents and other files. It also provides tools for task management; company notice boards and more backoffice type agenda.



<b>Cloud platform</b>	There are no worries about costs, acquisition, maintenance and administration of HW and system SW.
<b>Unified system and application SW environment</b>	Reduced maintenance and software upgrade costs, faster user orientation
<b>Consolidation of information</b>	Find information faster and with greater relevance, users can focus on other work
<b>Digitalization of business information</b>	Saving users' time by 5-70% depending on the products used, saving administrative workers' time
<b>Security features</b>	Multi-level protection against both unintentional and intentional data loss - reducing the costs of recovering lost data, or preventing impossibility of it.
<b>Up-to-date online information</b>	Management has a completely up-to-date overview of company information at any time

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