



## CCAI-UMS™ (Universal Merchant Services™)

**offers a comprehensive CRM and merchandising solution, enabling full product management from Campaign Setup to P&L Analysis. It addresses marketing setups, inventories and drop shippers through detail cost analysis for online and offline merchandising programs. Enhance your company's ROI on merchandise campaigns using one dynamic application.**

- Comprehensive CRM and merchandise management solution
- Unparalleled project control
- Capable, scalable architecture
- Product management, order processing, billing and marketing
- Addresses multiple inventories, warehouses and drop shippers
- Completely redundant with fully replicated database
- Continuity program management
- Detail cost analysis
- Online and offline programs
- Completely customizable infrastructure
- Fully integrated application architecture
- Extensive suite of included reports and custom reporting capability

CCAI-UMS's™ robust platform easily accommodates any merchandise venture. Unparalleled support for inserts, catalogs, continuities, online stores, and various purchasing systems are seamlessly integrated into an intuitive online interface flexible enough to accommodate a multitude of order handling protocols. Campaign customization enables you to specify relationships and standards that conform to each aspect of your venture. From embarking on a marketing project to identifying rules for shipping and billing to follow, CCAI-UMS™ takes on the task of project oversight. New

iterations for different campaigns can be created by simply renaming the existing effort, and individual edits can be performed to customize new requirements.

CCAI-UMS™ allows businesses to easily manage all aspects of running a complex merchandise program with capabilities that support order processing, billing, shipping, customer service and marketing management. The system allows for direct oversight of products, promotions, vendors, online storefronts and clients. CCAI-UMS™ offers a rich set of services, driven by business logic, which can be used to provide a customizable turnkey solution.

**Product Management** – CCAI-UMS™ captures product information at the time of setup and can be used for singular or multiple campaigns. Product information can be incorporated from pre-existing projects without the added task of re-entering product data, greatly reducing setup time.

**Customer Relationship Management** – CCAI-UMS™ has an intuitive, web-enabled front end which provides powerful CRM tools. The CRM Module displays membership data as well as solicitation and product information. The transaction history feature tracks all actions taken by individual agents on a customer's account, providing a view of the entire ordering history of a customer and serving as the central data mine for the CCAI-UMS™ system.

**Order Processing** – Orders can be custom-fulfilled according to business requirements. Processing occurs in batch format, used by third parties to submit files via telemarketing or data entry web site enrollments. CCAI-UMS™ supports online and by phone order processing.

**Billing** – CCAI-UMS™ can bill to multiple credit cards, bank cards, gas cards and other third party issued cards; processing protocols can be easily customized to handle other credit cards. CCAI-UMS™ also seamlessly integrates with all potential taxing scenarios.

**Continuity Management** – The system supports a variety of continuity programs, customizable by the client. Detailed metrics on customer order history are provided for targeted marketing opportunities, shedding light on persistency candidates and other marketing potentials.

**Warehouse Management** – CCAI-UMS™ defines warehousing parameters according to any business logic system, and allows for the modification of ship dates and order cancellation prior to shipping. Shipping labels can be printed by Teleformix™ or transmitted for on-site printing.

**Online Interface** – CCAI-UMS™ can act as a single point platform for an online storefront to sell products and services, while providing superior CRM with metrics.

**Marketing Management** – Companies using CCAI-UMS™ do not need to use a separate application to manage a product campaign. Marketers have the means to internally create commissions, review forecasting, implement upsells and cross-sells, and review P&L's. Budgeting and financial reporting for a promotion are tightly integrated to inventory and cost projection analytics.

**CCAI-UMS™ processes all actions in real time, in fully-integrated application architecture, ensuring that every aspect of a merchandise program is current and accurate on a variety of levels, from pre-sales setup to billing and delivery. New products are easily entered into the system, providing for autonomous management of an online store's web presence through a customizable interface. Active online strategies can expand and enhance a web presence via time-sensitive marketing modules. Offering customers up-to-date information, including product images, details and specifications, CCAI-UMS™ has proven to be an invaluable online marketing technology.**

## CCAI-UMS™ Reports

### ▶ Accounting:

- Billings And Credits Invoices
- Cash Paid Orders Report
- Charge Back Analysis Report
- Installment Receivable Report
- Ship Not Billed Report

### ▶ Marketing:

- Company Commission Report
- P&L Detail Report
- P&L Summary Report
- Promotion Forecast Report
- OP Charges Report
- Product Detail Report
- Promotion/Product Detail Report
- Promotion/Product Verification Report

### ▶ Sales:

- Authorization Pending Report
- Billing Re-Authorization Report
- Daily Sales Activity Report
- Product Gross Margin Report
- Sales Report by Client / Promotion \$/M
- Sales report By Client with Monthly \$/M

### ▶ Shipping:

- Open Order Aging Summary Report
- Total Shipped Orders By Week