

MOSAICRM SOFTWARE

THE FINANCE AND OPERATIONS TEAM

IMPROVE VENDOR RELATIONSHIP MANAGEMENT CAPABILITIES

MosaicRM Software provides finance and operations teams a single database for tracking key dates and activities for their research operation. The application provides contract management functionality, and logs analyst meetings, vendor ratings, and allocations, so that funds can improve their vendor relationship management capabilities.

FINANCE AND OPERATIONS TEAM FEATURES

Aggregate research-related activity into a single database

- Track vendors and contracts
- Manage vendor invoices and allocations
- Record approvals and other vendor management notes

Automate workflows and data capture

- Streamline your vendor approval processes
- Integrate important data with other key systems
- Initiate vendor reviews on pre-determined schedule

Reporting tools give you the information you need, when you need it

- Create alerts for contract renewals
- Track spending, relative to actual usage or budget
- Measure usage by analyst, vendor, consultant, or project

ABOUT MOSAICRM SOFTWARE

MosaicRM Software is a subsidiary of Mosaic Research Management, a provider of technology, customized recruiting services, and proprietary data subscriptions to fund managers at the vanguard of proprietary research. Clients value our best of breed technology, our flexible implementation options, and our company-wide reach.

CONTACT INFO@MOSAICRM.COM TO LEARN MORE

The screenshot displays the MosaicRM Software interface with several key sections:

- Notes:** A section at the top right with a table containing a single entry. The entry has a 'Created By' field with the value 'saic Admin Demo, 12/9/2011' and a 'Date' field with the value '12/9/2011'. There are 'Edit' and 'Delete' buttons next to the entry.
- Allocations:** A section below the notes with a table. The table has two columns: 'Action' and 'Allocation Entity'. There are three rows of data, each with an 'Edit | Del' link and a value: 'FundA', 'FundB', and 'FundC'.
- Vendor Invoices:** A section at the bottom left with a table. The table has two columns: 'Vendor' and 'Date Submitted'. There are two rows of data, each with an 'Edit | Del' link and a value: 'Kroll' and '10/9/2012'.
- Other Elements:** There are several buttons and links scattered throughout the interface, including 'Submit for Approval', 'Renew', 'New Invoice', and 'New Event'.

