

CRM / WEB CRM

CUSTOMER RELATIONSHIP MANAGEMENT



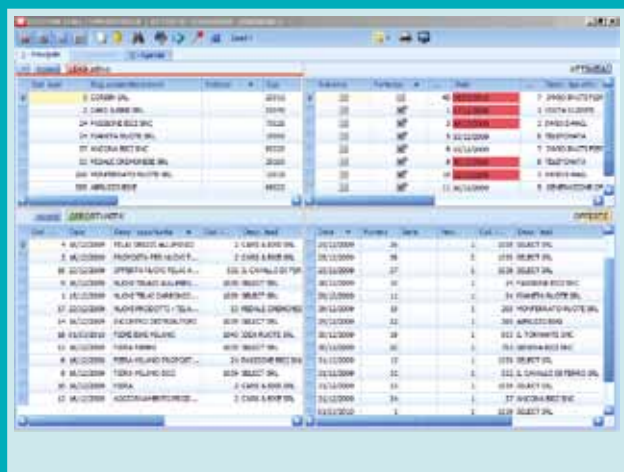


CUSTOMER RELATIONSHIP MANAGEMENT

*The CRM of NTS
Informatica*

A really effective customer loyalty building and the fundamental principles of its implementation have provided the starting point on which NTS Informatica has designed and built Business CRM and Web-CRM modules.

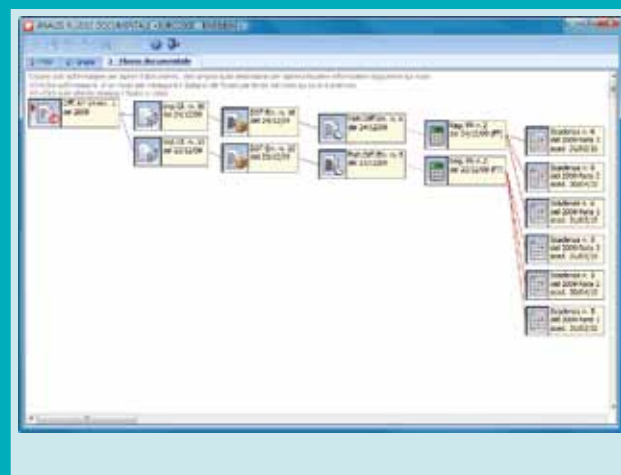
The cost incurred by a company in order to acquire a new customer is usually much higher than the one necessary to create new opportunities for already active clients; customer loyalty means therefore to know them, understand their requirements, anticipate timelines and expectations, being able to anticipate their needs with appropriate and satisfactory answers.



Negotiation management, reserved to the sales staff responsible for the pre and post-sales activities, has great importance and includes: new clients search, negotiations setting and monitoring, issue and review of the offers, organization and management of meetings and appointments, phone calls, e-mails and contacts with customers and prospects.



Through integration with the Business Linea Net management Suite, CRM and Web CRM modules enables each employee, depending on its position in the corporate structure, to obtain real-time access to the following information: clients personal data (highlighting possible different locations), dispatched and outstanding orders, delivered goods, accounting and financial situation, etc.. Any information necessary for the proper management of customer relationships is readily available.



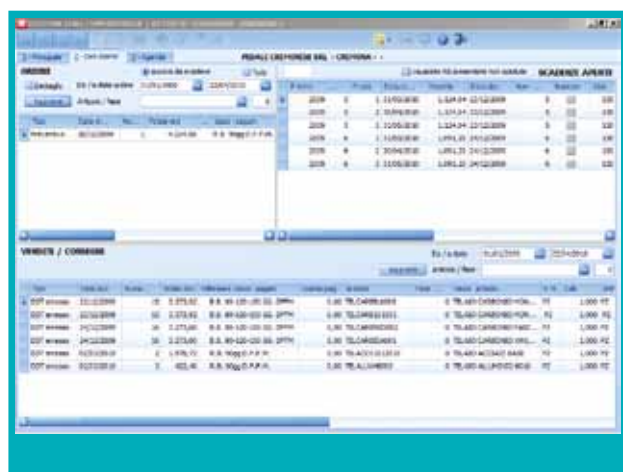
It is possible to review the history of revisions for each processed offer, and thanks to Documents Browsing feature available through the CRM module (in Windows Form), it is also possible to reconstruct the evolution of the negotiations till the receivables issue, evaluating individual documents directly starting from the Order confirmation, through the Delivery notes, issued invoices to the waste book registration.

Organizational hierarchical and relational structures can be defined in the context of complex business realities: from the single agent responsible for the commercial area and marketing operator to the sales director, from the secretary to the Directorate General.

The versatility and effectiveness of the Business CRM can be further increased through the use of the Datawarehouse module that provides processing of aggregate statistics and analytical data.

Special attention was paid to the needs of the staff working out of office: the agenda, remotely accessible also through Web CRM module, allows to assess instantly the activities to be carried out, share them with others and update those already completed, in order to ensure that the Commercial Direction has real-time control of all ongoing activities.

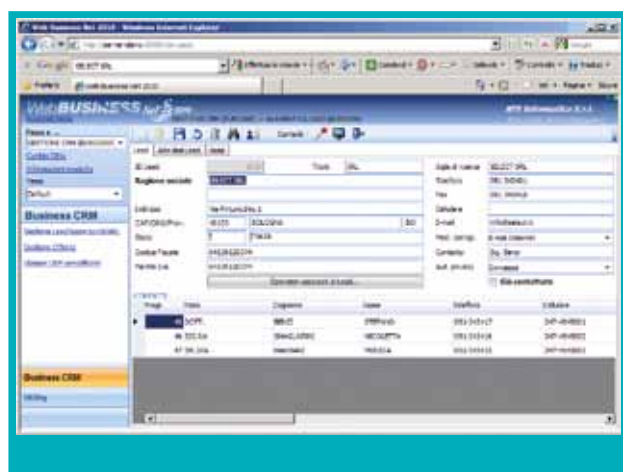
KEY FEATURES COMMON TO THE CRM /WEB CRM MODULES



1 Encode prospects

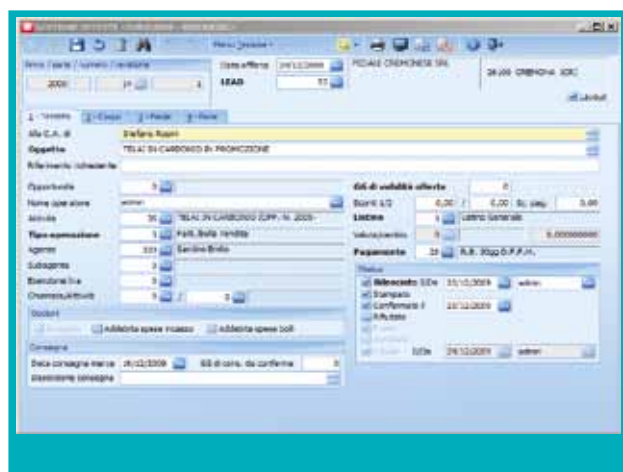
Both CRM and Web-CRM modules have a unified, configurable by the user, console, which allows to:

- > Encode prospects (Lead) and access the archive of existing customers, with the possibility of extending the personal data with additional fields
- > Associate with each lead any contacts with related data, e-mail, direct-dial phones, etc..
- > Activate/ open one or more deals
- > Record for each lead or negotiation planned and executed "activities"
- > View real-time Customer's site using Google Map©
- > Access directly other management data of the customer (for example: deadlines, open entries, previously made sales, orders, product availability, etc.).



2 Associate lead to contacts

- > Issue and administer commercial "offers" with the possibility to manage future revisions
- > Redirect deals with Microsoft Office Word©, combining images and product data sheets in a simple and intuitive way, creating documents in PDF format where it is possible.
- > Manage and monitor marketing campaigns in a fast and effective way, either through automated mailing (regular mail, e-mail, fax) or by phone (back office)
- > Send e-mail or documents, even in massive mode, recording the activities automatically, identifying the recipients through lists of Customers or Lead, or on the basis of their position in the corporate structure (back office)



3 Issue and manage offers

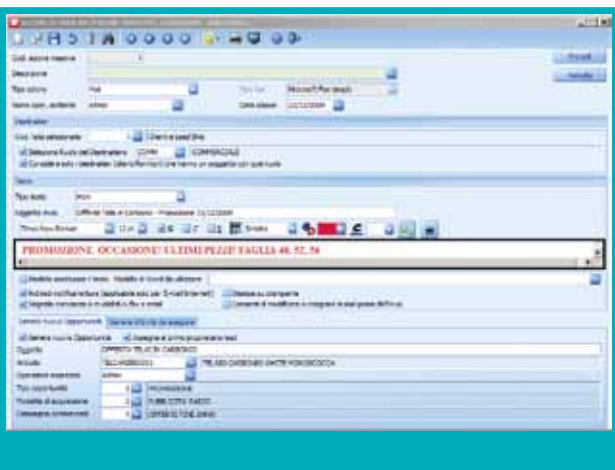
- > Manage the agenda having the possibility to assess the personal calendar and, according to the established priorities, also the calendars of other agents; the agenda activities can be filtered by the status: to do, done, or cancelled. The agenda can be represented in various time formats (day, week, month, etc.).

OTHER FUNCTIONS AVAILABLE THROUGH CRM MODULE (WINDOWS FORM)

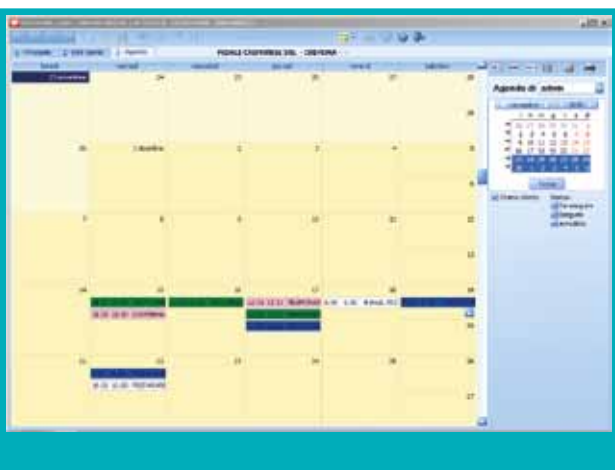
The CRM module, being addressed to the audience with more complex needs and available on local network and Terminal Server®, provides additional functionality:

- Associate electronic documents with the individual negotiations and lead
- Query, search and browse the data, contained in: Customer records, Leads, opportunities, deals and activities, using powerful selection filters
- If the Business E-Mail module was activated, there is a possibility to associate with the individual offers all the sent and received e-mails
- Starting from the order creation Documents navigation leads the operator up to the waste book record registration and the related deadlines, through order, delivery notes and invoices, giving the possibility to view the individual documents

4 | Process offers with Microsoft Word®



5 | Send documents in massive mode



6 | Agenda management

PREREQUISITES

In order to be able to use CRM module, at least one of the following modules is required:

"Customer/Supplier Orders"
"Sales/Billing"

Besides these there are some highly recommended optional modules ideal for integration with CRM

"Storehouse"
"Agents and Commissions"
"Generate .pdf file from documents"
"Statistics"
"Datawarehouse"

Note: The hardware requirements are regularly updated and available at www.ntsinformatica.it



NTS informatica S.r.l.

S.S. Rimini-San Marino, 142
47924 Rimini - Italy
tel. +39 0541 906611
fax +39 0541 906610

info@ntsinformatica.it

*All mentioned company names and products are registered
trademarks of their respective owners*

*NB: The Producer reserves the right to make changes
or modifications to the product features.*

www.ntsinformatica.it