

CRM (Client Relationship Management)

Intended for all services, these applications let you better know your customers, better qualify them to better meet their needs and increase sales. Thanks to the definition of management processes, you can grow the number of prospects and managed leads, work more efficiently while saving time and money.

The solution ultimately allows you to focus on the real capital of your business: the relationship with your customers.

■ What are the benefits of the CRM applications?

- ✓ A consolidation all clients information from all the departments
- ✓ An improved communication and information exchange
- ✓ An understand and respond to customer needs thus increase customer satisfaction
- ✓ An increase in sales
- ✓ A facilitated and automated administrative document flow
- ✓ An automatic view of customer's record and history before his/her call is

■ CRM Modules

- ✓ Companies and contacts management (XRM)
- ✓ Work Schedule (+ Outlook Integration)
- ✓ Quotation, Offers and contracts
- ✓ Sales Force Management - SFA (PDA - Windows Mobile)
- ✓ Leads Management
- ✓ Orders and invoices
- ✓ Business Intelligence
- ✓ CTI (Inbound, outbound calls)
- ✓ Outgoing Calls Campaign
- ✓ Call Center scripting and questionnaires

■ Companies and contacts management (XRM)

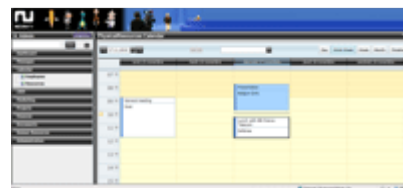
The employees of your company can reach the 360° view of all companies and contacts in your organization. (Suspects, prospects, customers, suppliers, competitors,..). They can manage all relationship activities and reports, assign tasks to other employees and follow the sales process defined.



After the appointment, the commercial fills his report, either directly on line, or on its smart phone / Iphone. Then, it synchronizes information with the main server. The report/ratio is then recorded in the database and consultable immediately by all the people of the company. Search engines make it possible to find information according to several criteria: name of the company, name of the contact or person in charge of the accounts.

■ Work Schedule (+ Outlook Integration)

Establish your work schedule per day, per month, by employee or team. A very functional ergonomics thanks to a drag and drop system. A synchronization supplements with Outlook. In addition to Outlook, this work schedule is related to the internal projects (marketing, perspectives, offers...) and external (Opportunities Customers) of your management Portal. The module enables you to provide all the management indicators (time and costs) necessary to your good management.



■ Quotation, Offers and contracts

Automate the creation of the offers and contracts by a simple and collaborative process which enables you to save time. Define the template of documents, the standards contents to be posted, the grids of calculation of the prices. Constitute your documents then quickly, work in real time, trace their evolution, their validation by the persons in charge. Benefit from the complete prudence to improve your commercial management.



■ Sales Force Management - SFA (Smart - Windows Mobile)

This module allows you to organize and track teams on the field in real time. Each business transaction (distribution / repair) is planned and will be followed by an activity report which feeds in real time the database of management portal and will be visible to the concerned managers.



Mobile users have access to all details regarding their customers, products, purchase orders, invoices, visitation programs or delivery. The module allows the seizure of business reports, qualification data, location-based GPS and photo transfer. The application allows the teams on the field to complete the questionnaires created since the marketing campaign module. Using this module is available so connected or disconnected. When the user has access to the Internet, he can simply replicate data. New version available for Windows Mobile 6.0.

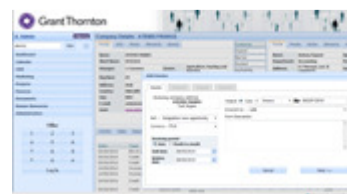
■ Leads management

With this module, record all identified opportunities with their details (definition, date, teams, revenues, external contacts, tasks to be realized, attached documents). Share information in real time and follow the progress report and the activities undertaken by all the teams. Release from the analyses of opportunities per month, commercial, type, progress report, group of companies, Benefit from a search engine to combine several criteria and thus benefit from effective information.



■ Orders and invoices

Create easily the orders for your customers or allow them to do it from their customer portal. After validation, you can convert these orders into delivery bills. These bills can then be converted to invoices. This application allows multi-currencies and multi-invoicing companies. Customize your invoices layout as you wish.



Manage afterwards the payments of the invoices and get the payment balances. Get the lists of invoices by date, by customers, by payment status. Allow you customer to see the orders and invoices list from your customers' portal. This application can be linked with the debt collection workflow and other Atemis financial applications.

■ Business Intelligence

With this module, you get or create by yourself all the reports and charts which are necessary for your sales managements. All the reports/ratios may be created from the database of the Portal as well as from external ones. Track with precision the number of actions, leads, sales by customer, by branch, by sales persons. Analyze the impact on each target and improve your operations.



■ CTI / Integration avec serveur VOIP

Integration with telephony allows you to **increase the intelligence** of your solution and to **save time**.

Click the phone number to call and enter the report into the window that opened automatically.



Upon receiving a call, a page tells you what the caller and the subject of the appeal. You can transfer the call and the contact card will automatically be opened for another user.

You save time with the analysis and reporting simply because you can cross all business information with the call logs to create management indicators and improve your business.

The module marketing campaign to create segments that will be contacted by the operators and qualify the CRM in real time. The predictive calls, by skill are made automatically. With the use of VOIP, the operator manages the campaign remotely from a remote office or home. Details related to calls are automatically recorded in the CRM and records of customers and allow real-time analysis of the effectiveness of campaigns.

■ Call Center (Outgoing and incoming calls)

Modules dedicated to Call Center professionals with remote and home working. The module includes 12 features for incoming and outgoing calls (Qualification records, administration of questionnaires, online sales, making appointments, helpdesk ...) all connected to other modules Atemis.

