



smart_CRM 3.00

Manage addresses, create processes and file correspondence according to project, customer and keywords.

Includes Microsoft Office integration



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Successful business relationships are valuable capital for a well organised company. With **smart_crm** you can organise and manage your customer contact and address data down to the tiniest detail. The more you know about your customer, the better you can manage your business. You can be more accurate in fulfilling your customer's requirements, enabling long-term partnerships to develop.

smart_crm puts all the important information that you learn from talking and meeting regularly with your customers at your finger tips. This knowledge will give you a competitive advantage. Actively develop customer relationships, and maximise your success through custom, one-to-one communications that are based on your customer's needs.

smart_crm integrates correspondence and contact management, and organises reminders and to-do lists. **smart_crm** allows you to manage contacts and correspondents for all companies and contacts. You can address free-form and standardised letters, mails and faxes to each contact, or include them in mail shots, distributed electronically or by post. The documents to be created can be designed as you wish, in the form of Microsoft Word templates, so that they comply with your corporate design guidelines.

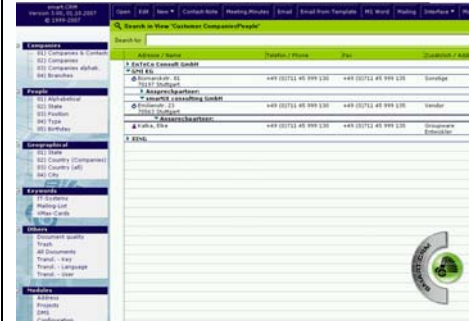
Customer events such as telephone calls, visits and internal notes can be logged and **stored** chronologically in **smart_crm**. You maintain a central overview of your current customer relationships.

The integrated **smart_dms** document management system ensures that all incoming and outgoing documents are filed electronically for each contact. Providing all users with the latest information, **smart_crm** is your unified central communications system. It guarantees a high quality of data, allowing employees in different offices to share the same level of knowledge of a customer at all times.

A reminders management function is integrated in **smart_crm** to support sales departments in adhering to automatic, predefined sales cycles. An important factor here is the distinction in two groups – the time-based meetings (customer visit or fixed telephone date) and time-independent reminders. Reminders are created when a contact event is recorded, providing an immediate reminder for the next contact. No more losing import contacts and actions.

You will keep an eye on all major events. Individual entries can be converted into a detailed contact entry with a single click of the mouse. **smart_crm** is of particular interest for all companies whose customer communications are currently operating over different communications channels.

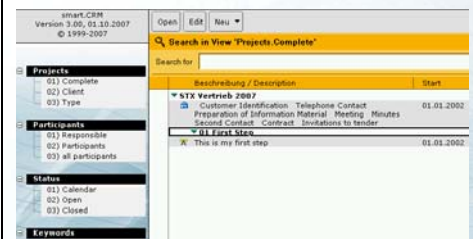
With **smart_crm**, all the information is where it should be – with the customer. Handheld folders, different e-mail inboxes and post-it notes are finally a thing of the past.



smart_crm address module



Detailed view of a record in the address module



smart_crm project module



smart_crm DMS module (smart_dms)



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Overview of smart_crm features

- Address database with integrated document management
- Search functions and contact lists for companies and people
- Electronic filing of incoming and outgoing correspondence
- Mass mailing and single mailing function (post, e-mail)
- Automated integration of reminders and copies to personal calendars

Advantages / benefits

- High quality data, no redundant data entry
- Local encryption of all data reduces the risk of loss to a minimum
- Fast, complete information for all concerned
- Highly efficient, thanks to full functionality without network access
- Transparency of sales, customer-oriented actions
- Match sales cycles
- Fast and simple preparation of mail shots and mass e-mail

Release information

The experiences gathered from our customer installations over the 6 months have been brought back in house and have contributed to improvements and enhancements to the existing smart_crm system. The latest innovations include:

Addition of detailed project management

In the project module the project management handling has been rewritten and project-based filing improved, taking account of a customizable folder schema.

Improved performance

By distributing the existing volume of data over different instances, smart_crm guarantees great performance even with large volumes of data.

Flexibility

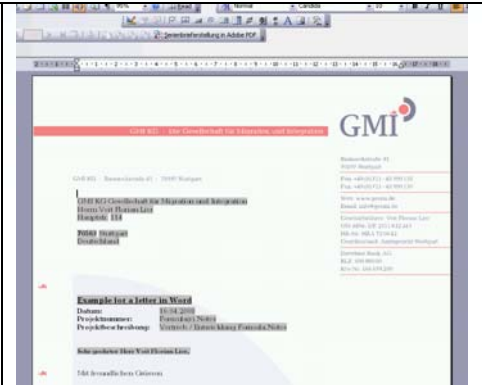
Enhancement of the control browsers now means even more configuration options for customer wishes.

Multilingual

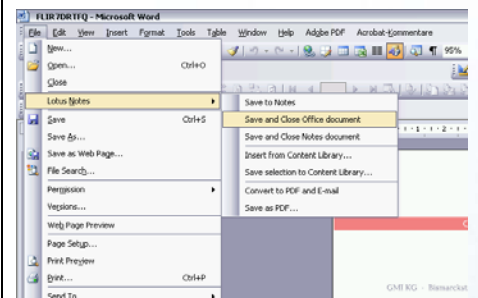
From version 2.5, the language used can be freely selected at user, departmental or business level.

System requirements:

smart_CRM 3.00 runs on Lotus Notes versions 5, 6, 7 and 8.



Example of integration with Microsoft Word



Example of integration with Microsoft Word (2)



Integration of ToDos from smart_crm

