

# Innosoft Customer Relationship Management



## Customer Relationship Management

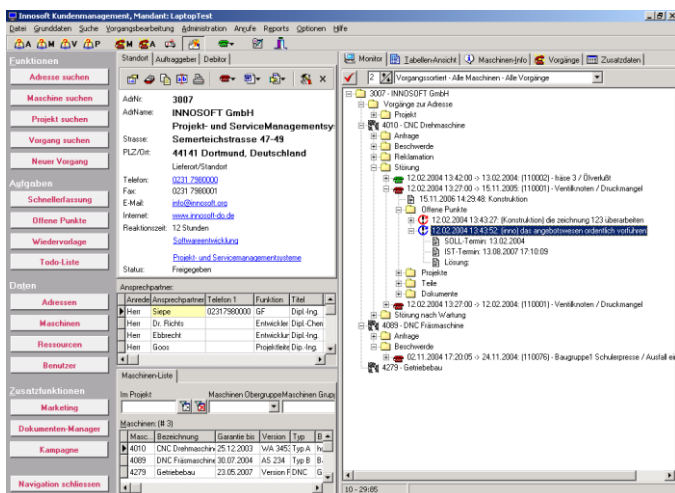
### Features

#### Functions

- Overview of all procedures, employments, vouchers, proposals, invoices, documents, inquiries
- Variable and preset workflow
- Integration of involved departments
- Filing and allocation of the documents and reports
- Procedures, open points (partial procedures) and to-do list
- Reminder / duration of the order processing
- CRM functions with telephone connection
- Coding of faults with references
- Helpdesk

#### Benefits

- Plant-, machine- and customer history
- Informed talk partner at customer call
- Intensification of customer bonds
- Information pool for sales and design department
- Evaluation of construction and production defects
- Fault analysis
- General survey configurable individually
- Reminder



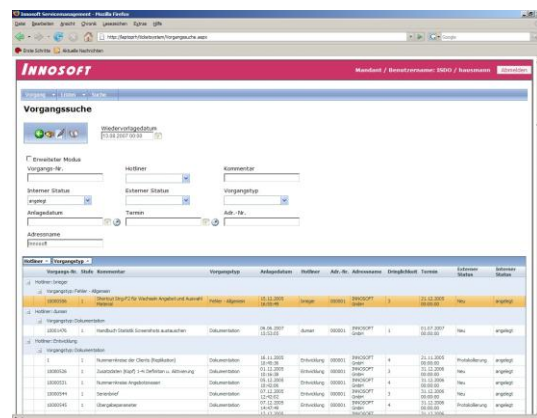
Individually configurable general survey

### Customer Relationship Management as CRM Solution

The **INNO SOFT** Customer Relationship Management is the connection between customer and company. Here incoming inquiries, reported faults or orders are received as procedures and processed until completion.

All information belonging to a procedure and/or all open points are being forwarded to the responsible departments such as e.g. sales and distribution, service, designing department or materials management.

An intelligently used customer relationship management can let the basis for a sales talk or a construction improvement be developed e.g. from a complaint.



Procedure registration in the Web

Based on the customer, supplier, personnel and product database the personal data sheet of a "product" is continuously illustrated, from the bid preparation to the assembly and maintenance together with faults and repairs. It does not matter whether the product which is to take care of is an engineer performance, a machine or a software program.

Procedures are being created in the program, which can be supervised until the final completion e.g. with automated reminders. An order supervision of article and assembly groups is just as well possible, since also a serial and a batch number can be assigned to the articles apart from the part number.

# Innosoft Customer Relationship Management

## Procedure and Complaints Processing

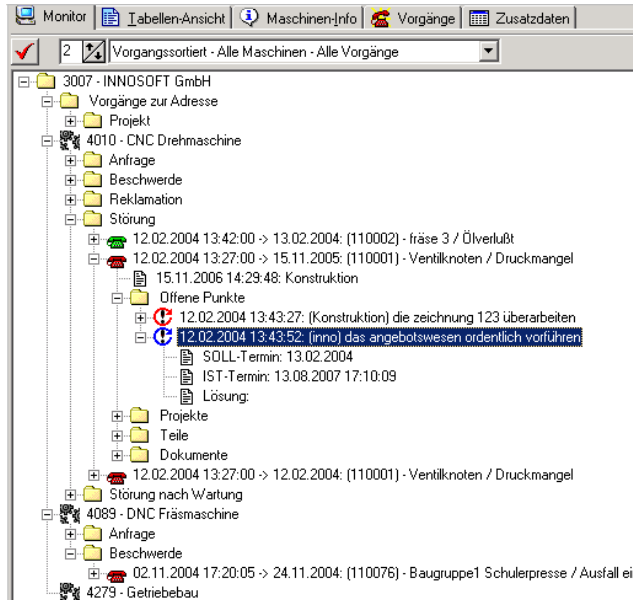
A good enterprise is characterised by how quickly and well informed it reacts to complaints or inquiries from customers.

Complaints are unpleasant both for the customer and the service employee. If you take into consideration that 75% of the customers do not know which employee or department of the supplier is responsible for a complaint, then it is easy to realize how important a well informed contact person is for both sides.

**INNOSOFT** Customer Relationship Management offers the possibility to record and evaluate current procedures like e.g. complaints, failure reports, orders, service employments, proposals, invoices etc. with all resulting information.

With the procedure and the associated open points it is guaranteed that either a direct dispatch of a product, a spare part or the deployment of a mechanic is triggered. The customer contact always reaches the appropriate executive, who can arrange the necessary works.

The completion of the assigned tasks (open points) can be controlled and/or be reminded automatically.



Control of open points

The registration and documentation of faults is a key function of the customer relationship management. A classification into different fault codes (location, type, removal & cause) can be made. The system automatically provides suggestions for solutions on the basis of a fault history evaluation. The statistic evaluation of the data acquired in that way provides knowledge which can be used for the optimization of the construction and order processing.

## Customer-, Machine- and Plant History

In the **INNOSOFT** Customer Relationship Management different address types such as e.g. prospective clients, customers etc. can be registered and entered including the company addresses, contacts, machine and plant data, or additional data.

An overview of the projects, employments, vouchers, invoices/proposals/orders, servicing contracts and documents facilitates the administration and support of the customer data.

Vorgangs-Nr.	Stufe	Zeit	Datum	Status	Statustext	Typ
10001588	1	10.0	28.09.2007	3	deligiert	Softwareerweiterung
10001572	2	24.0	27.08.2007	2	neu deligiert	Angebot
10001572	1	24.0	07.08.2007	9000	weitergeleitet	Angebot
10001552	1	10.0	31.08.2007	1	angelegt	Softwareerweiterung
10001552	1	09.0	23.08.2007	1	angelegt	Fehler - Software
10001541	1	06.0	10.08.2007	9999	abgeschlossen	Nachpflege
10001538	1	03.0	31.08.2007	1	angelegt	Nachpflege

Quick overview of relevant customer data

Extensive search and filter criteria allow the quick finding of address-, machine- and project data as well as all procedures.

## Sales and Resource Planning

From the customer relationship management proposals and/or orders can be provided and projects and deployments can be created. This allows an effective and quick processing of inquiries and resulting tasks.

Furthermore the customer relationship management can be extended with the following **INNOSOFT** modules:

- Resource planning & mobile field service
- Bid and order management
- Project management
- Maintenance module
- Invoice processing
- Document manager
- Telephone system (Innosoft Phone Centre)
- Stock, article and parts list management
- Statistics

## System Requirements

Operating system: Windows 2000 / XP  
Main memory: 256 MB  
512 MB (for Win XP)  
Fixed disk: 250 MB for the program,  
Data according to volume  
Database: MS-SQL Server / MSDE  
Oracle  
IBM DB2 or IBM DB400

Copyright © 2007 **INNOSOFT**. All rights reserved.  
Other article and product names are registered trade marks of the respective owners.