Module Overview

the modular approach to **better customer intelligence** for all types and sizes of company

- Business-to-Business or Business-to-Consumer Contact Manager
- Document Manager
- Telephony Integration
- Sales Lead Tracker
- Sales Ledger Integration
- Sales History
- Products and Pricing
- Quotation Engine
- Sales Orders
- Purchase Ledger Integration
- Purchase History
- Problem Tracker
- Infobase Searching
- Problem Analysis Matrix
- Service Contracts
- Advanced Relationships
- Screen Customiser
- Real-time Data Tunnel
- XML API (Application Programme Interface)
- Report Writer and Toolkit
- SOAP/.Net API

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Module Overview

Select from a range of dedicated ProspectSoft CRM modules to customise your system for your unique situation

Business-to-Business or Business-to-Consumer Contact Manager

ProspectSoft CRM's B2B Contact Manager, with its inherent hierarchical structure, enables users to capture all relevant information about customer organisations with single or multiple branches or locations and multiple contacts at each branch.
The B2C Contact Manager is suitable for organisations that deal primarily with individual consumers. Users can select either the B2B or the B2C module or, uniquely, can run both concurrently.

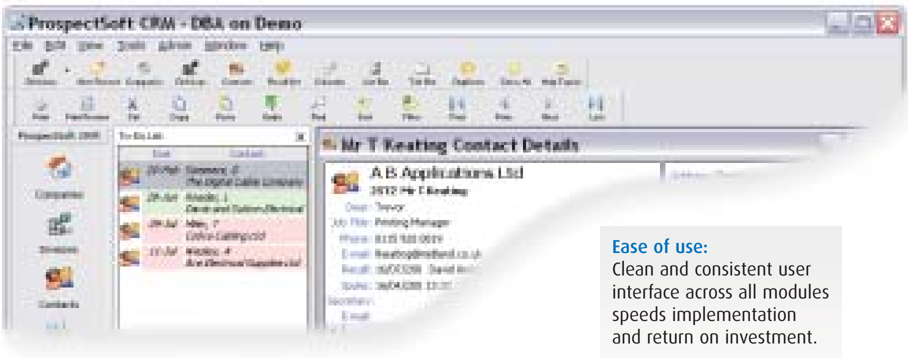
Document Manager

Through close integration with the Microsoft Office® Suite, users can produce, store and version-track Word and Excel letters or faxes and Outlook e-mails, within the ProspectSoft CRM database. These, together with scanned hardcopy and incoming electronic documents, are all held against a customer or supplier record, or against individual sales opportunities, customer problems or supplier queries, to provide instantly accessible and reliable document management.
Because documents are held within ProspectSoft CRM rather than using an external link, they are accessible to all users, including those in other offices or on the move.

Telephony Integration

Compliance with Microsoft's TAPI standard means that ProspectSoft CRM integrates with most widely used telephony systems 'out of the box', to manage outgoing and incoming calls. Users can automatically call companies or individuals from any record, while incoming caller details are displayed clearly, but unobtrusively. The system recognises incoming DDI, switchboard or mobile numbers, or will find the closest match.

(figure 1.)



Ease of use:
Clean and consistent user interface across all modules speeds implementation and return on investment.

Sales Lead Tracker

Individual sales opportunities across multiple contacts can be managed within ProspectSoft CRM. When leads are logged, a variety of customer-defined details can also be recorded, such as product or service type, new or repeat business, value, time-scale or source, all on one screen. Leads can be progressed through multiple user-definable steps before closure, involving different individuals or departments, for which triggers and reminders can be set.

Sales Ledger Integration

Through ProspectSoft CRM, non-accounting system users can acess key sales ledger information quickly and easily. This includes summary balances, individual transactions, credit limits, on-stop details and credit controller notes. Individual transaction images such as invoices can be viewed, as well as comments in the ledger notepad. New sales ledger accounts can be created from within ProspectSoft CRM, while customer details such as address and telephone number are automatically maintained across both systems. Network users view ledger information in real-time, while remote and mobile users have access through regular updates.

Sales History

In combination with Sales Ledger Integration, this module provides ProspectSoft CRM users with considerable detail about a customer's purchases, over any time scale and not simply accounting periods.
Sales History presents a very flexible and in-depth view of sales information compared to a typical accounting system, by giving easy access to, and powerful analysis of, both customers and products. Every item on a sales order, delivery, invoice or credit note, with its price, quantity, delivery status, payment status and various references, is presented in detail and can be reported on in a variety of ways. Sales History is available to users in the office and on the road.

Products and Pricing

This module gives both office-based and mobile users direct access to data held in the accounting system on product stock levels, prices and discounts, including discount matrices where applicable.

Back-Office Integration:
Access and use customer and supplier information from all back-office systems in real time

see also sales ledger, purchase ledger, stock and prices, sales orders, sales history and purchase history modules.

(figure 2.)

Quotation Engine

Used in conjunction with Products and Pricing, the Quotation Engine takes data from the accounts system to produce quotations, which can then be formatted in Word or Excel document templates. These can be sent to the customer in hard copy, by fax or by e-mail.
As with many other modules, the quotation engine is also available to mobile users, who can, for example, produce quotations on a customer's site.

Sales Orders

When customers accept quotations that have been prepared in ProspectSoft CRM, they can be entered automatically as orders into the accounting system's Sales Order Processor (SOP), thus eliminating the need to re-key any data. Equally, orders can be prepared in the CRM system and entered automatically into the accounting system SOP.
Order-entry is accomplished in one simple step requiring no direct involvement in, or detailed knowledge of, the accounting software. Once entered, orders are then processed in the usual way, individually, or in batch, through the accounting system's SOP.

Purchase Ledger Integration

Through ProspectSoft CRM, non-accounting system users can, quickly and easily, access key purchase ledger information, including summary balances and individual transactions. Drill-down to individual transaction images such as invoices, is also possible, as are updates to the notepad.
New purchase ledger accounts can be created from within ProspectSoft CRM, while supplier details such as address and telephone number are automatically maintained across both systems. Network users view ledger information in real time, while remote and mobile users have access through regular updates.

Purchase History

In combination with Purchase Ledger Integration, this module provides each user with considerable detail about suppliers' orders over any period. Purchase History presents a very flexible and in-depth view of purchase information to allow comparisons of suppliers' products, prices and delivery times, which is particularly valuable in back-to-back ordering situations. Like Sales History data, purchase information is accessible to ProspectSoft CRM users on the road and in the office.

Problem Tracker

Customer problems or issues can be logged against any contact or sales lead, with details about problem type, status, incidence, or other user-defined categories. All problems are automatically date and time-stamped by the system when they are logged and when any subsequent actions are taken. They may be assigned or escalated to an appropriate person or department for resolution and can remain 'live' until closed by an authorised user. The problem tracker can also be used with the document and quotation modules, for letters, faxes and e-mails, and quotations for repair or service requests.

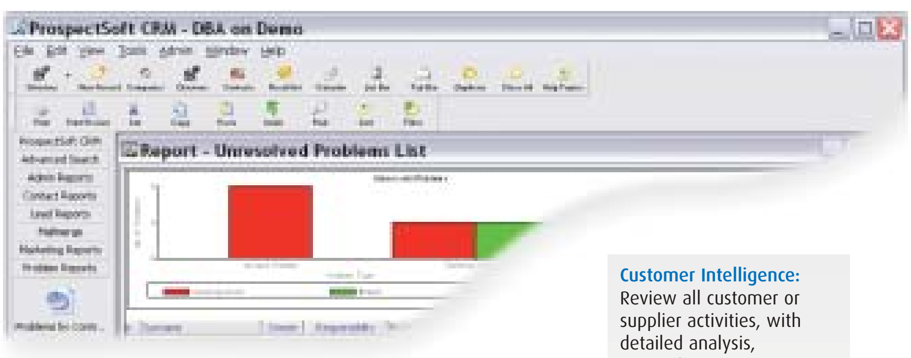
Infobase Searching

This module, in combination with the Problem Tracker, enables users to build a library of resolved support issues for access by any member of the organisation to provide rapid solutions to customer problems. It is designed particularly for use on customer support or help-desks where symptoms can be logged, and the Infobase searched by key words and/or problem categories. The library is easily updated on a live basis by adding symptoms and solutions as new issues arise.

Problem Analysis Matrix

Used in combination with the Problem Tracker, this is a fast and structured problem capture tool, especially designed for high volume help-desks or call centres. It enables users to position a customer enquiry or problem into any one of up to 10^{10} (=10,000,000,000) permutations using a simple tree structure of drop-downs for analysis levels. Not only is data entry improved; subsequent reporting and analysis is greatly enhanced.

(figure 3.)



Customer Intelligence:
Review all customer or supplier activities, with detailed analysis, comprehensive reporting and instant drill-down.

see also sales leads, problem tracker, sales and purchase history, and the report writer modules.

Service Contracts

This module is designed for management of products or systems covered by service, support or maintenance contracts. Details of contracted customers and products are imported automatically from the accounting system's sales order processor, through the ProspectSoft CRM Sales History Module.

When customer problems or support calls are logged in ProspectSoft CRM, all product and contract details such as validity, period or payment status, are presented instantly to the user, for allocation of the service call. Quotations for service provision can be prepared instantly, for any items that may not be under contract.

Advanced Relationships

Relational databases are extremely powerful, providing structured, tree-like relationships to manage standard information, although they can be restrictive if alternative or non-standard relationships are required.

This module enables users to establish their own links across the classic database structure, to relate any 'object' (e.g. a sales opportunity, quotation, or problem) in one company, with any other 'object' (a person, say) in any number of other companies.
This 'many to many' relationship means that from one customer contact screen in ProspectSoft CRM, a user can see any 'third party' contacts or projects that might have a bearing on a sale or a customer issue, but are not directly related to it. The nature of such a relationship – supplier, client, consultant or project manager for instance, is definable by the user.

Screen Customiser

ProspectSoft CRM users who need to rename specific fields or labels on any screen, modify layouts, or even translate labels and fields into different languages, can use this module for modifications, without having to source in-depth programming skills.

The Screen Customiser is designed for those organisations that typically have a requirement for:

- Industry specific terms or vocabularies
- Different data fields in one department versus another
- Data security (e.g. field masking) in certain parts of the organisation
- Multi-national and multi-lingual operations

Real-time Data Tunnel

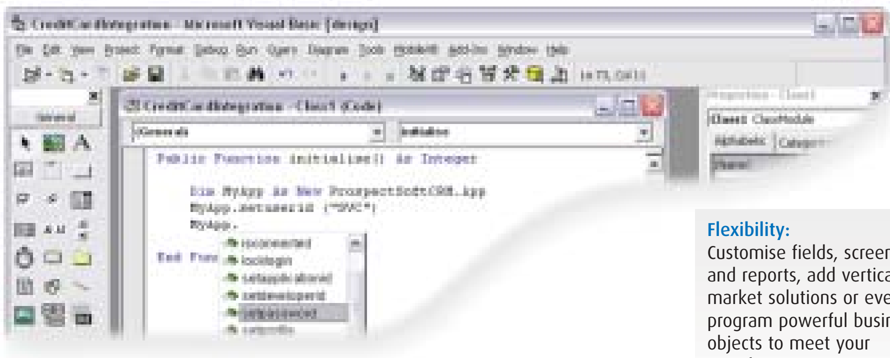
Companies that run ProspectSoft CRM alongside other databases on the network are able to review and analyse information contained in those databases from within ProspectSoft CRM and in real time. Reports and views can be provided in tabular or graphic form, by accessing data from several databases at the same time, as if from a single source. Like other ProspectSoft CRM modules, advanced programming skills are not required to establish or use these database links.

These extensions provide ultimate flexibility, from simple popup warnings, to two-way integration with other applications and vertical market solutions. Solutions can be off-the-shelf, from third parties (see web-site solutions catalogue) or created to order where necessary.

Report Writer and Toolkit

InfoMaker is a fully integrated GUI report writer and toolkit that enables a ProspectSoft CRM user to sort and present information in precisely the way the business needs it. With InfoMaker, comprehensive reports can be written to analyse any of the data fields contained in any ProspectSoft CRM module, using any criteria. InfoMaker allows the user to edit, and tailor completely, any of the standard reports that are supplied with ProspectSoft CRM. Separate reports can be produced in a wide range of layouts, such as lists, groups or cross-tab analysis, in a wide variety of graphic outputs like bar – pie – or 3D-charts, series, scatter or line graphs.

(figure 4.)



Flexibility:
Customise fields, screens and reports, add vertical market solutions or even program powerful business objects to meet your specific requirements.

XML API (Application Programmable Interface)

Along with its wealth of out-of-the-box integration and flexibility, ProspectSoft CRM can be further extended through an easy to use programmable interface. The XML API provides industry standard XML access to key business objects, as well as the ability to invoke specific action in response to thousands of system events.

SOAP/.Net API

Any ProspectSoft CRM system can be integrated with other business applications that are running remotely, over the Internet. This standards-based extension of the XML API allows integration with other applications and processes, whether part of the user's business, or run by 3rd parties such as customers or suppliers. This level of business-process integration can deliver unparalleled efficiency, through tight and automatic integration of the entire supply chain.

Key Features

- Configurable for many sizes and types of organisation with multiple functional modules
- Fully scalable from entry-level to enterprise-wide solution
- Sales force, marketing and field service automation, all with management escalation
- Dynamic integration with Microsoft Office giving full document management
- B2B and/or B2C customer relationship management within one system
- Dynamic analysis and detailed management reporting on customers and suppliers, sales, service or products

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