INFIMACS II® Data Sheet

Integrated Financial and Manufacturing Control System

Customer Relationship Management (CRM)

FUNCTIONS

- CRM Workbench
- Activity Tracking
- Customer Database
- Prospect Database
- Incident Reporting
- Fulfillment

FEATURES

- Activity Status
- Activity Maintenance
- Activities Access Levels
- Executive Activities
- User-definable Codes and Fields
- Multiple Contact Maintenance
- Convert Prospects to Customers
- Lead Source and Effectivity
- Campaign Tracking
- Hot List Functionality

SUMMARY

Customer Relationship Management (CRM) is a valuable tool for keeping track of interactions with customers and prospects. The INFIMACS II CRM Module extends typical customer and prospect data by adding a database of contacts, activities, and status codes. The CRM Workbench is accessible from the Customer or Prospect Master screens and is linked to all major CRM functions. You can see which campaigns generated leads, which leads converted to true prospects, which activities produced results, and the status of any prospect or customer at any point in time.

Unlike stand-alone Customer Relationship Management programs, Relevant's CRM module integrates completely with the INFIMACS II Estimating, Quotation, Sales, and Receivables modules. The CRM module provides unlimited contact information and activity tracking for existing customers and prospects.

Prospect information includes static profile information as well as details regarding ongoing sales and sales cycle activity. User-defined status codes can be established to follow each prospect through the sales cycle, schedule upcoming activity and follow-up, and set and track a "hot list" activity that requires a high profile. Responsibility codes can be attached to each status code to identify which salesperson is working with prospects at any point in the cycle. Lead sources can be identified to determine which marketing campaigns, media, or combination of activities produced the greatest responses. You can even keep a file of competitors vying for the same prospect to improve your sales efforts with that prospect.

Customer information includes details and history regarding sales, shipments, invoices, payments, and current AR aging. This integration puts your prospects and customers directly into your Enterprise Resource Plan. With the addition of the INFIMACS II Call Tracking module, you can view "Incidents" entered for each customer and ensure the timely resolution of such incidents.

Where security is required, the CRM module can be configured to restrict the viewing of activity information by access level code. For example, executive access codes can be established to restrict access to Executive Activities.

Numerous user-definable codes, fields, and screens allow you to retrieve and store special prospect and customer information that is unique to your particular business. You can select and sort this customized information on screens and reports to meet your needs and priorities.