



The CRM System perfectly integrated

A process involving everyone

How long does it take until you really know your target group and customers? How much IT support is then necessary? How should it look like?

These questions are not easy to answer – but it is about these very questions of how to structure and maintain customer relationships. Customer Relationship Management (CRM) is a process that is never completed and must always adapt to the changing of the surrounding conditions. A process that is not limited to a few departments, but affects the whole company continuously.

A CRM system must fit in this framework where all customer-related processes are fully tracked. SMARTCRM is this CRM system: As flexible as necessary – as individual as possible.

- SMARTCRM is a comprehensive solution for customer and information management for department managers and senior executives, or in sales, marketing and after-sales service.

- SMARTCRM has a modular design. The system provides as much CRM functionality as needed and grows with the requirements.
- SMARTCRM is the perfect CRM solution for the small and mid-sized enterprises and the industry. As a SME itself, SMARTCRM knows exactly the requirements. With over 20-year expertise in the industry, the CRM manufacturer combines the experience acquired through processes and market developments with the expectations and demands of the customers.

Flexible start

In the basic version, SMARTCRM covers all topics that you need for the introduction of a systematic CRM. Through the modular design, the CRM software can be expanded at any time. This ensures you not only flexibility in customer management but also the confidence to invest in the theme CRM with moderation – since SMARTCRM is always as much CRM as you really need.

SMARTCRM.Basis



SMARTCRM is for the whole company: department managers and senior executives, as well as sales, marketing and after-sales service. The software is designed to the requirements of small and mid-sized enterprises and industry – for over 20 years. With SMARTCRM basic version, you start immediately right since it covers all important CRM tasks:

- Address management
- Complete customer history
- Relations and hierarchies
- Document management
- Marketing campaign management
- Tour planning
- Appointment /Task management
- Substitution management

Address management

Who, where and with whom

In SMARTCRM, you can structure and manage the addresses relevant for your CRM processes. For each address, there is a file in which all related information – e.g., location, contact, responsibility – as well as activities are collected and made available across the company.

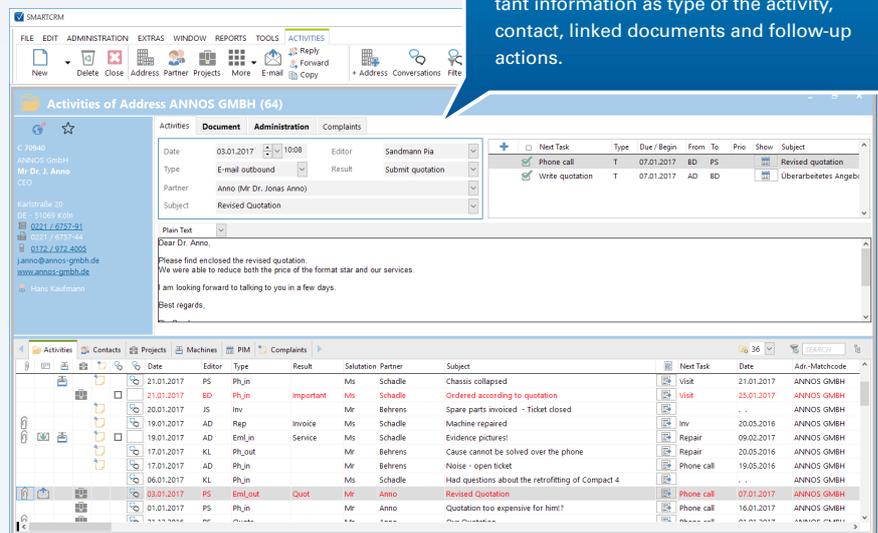
Complex organizational structures of your customers can be clearly represented in SMARTCRM. Thus, even for short term substitution cases, it always ensures that you can properly categorize your contact. About the mapping of relationships and hierarchies, you always know exactly, who had contact with whom and what role he played.

Categories simplify the assignment, as customers, suppliers, partners, etc... The system also eases visual orientation, in that your fields and masks can be individually set.

Furthermore you can complete the address management in SMARTCRM with important information. Depending on the purchased additional modules and the interfaces, for instance, offer status, sales / target figures, enterprise resource planning data, service reports and tickets can be directly linked with the corresponding address.

Thus, you are at any time not only informed about the customer but also you have the current history in view.

The customer file contains extensive address and contact information. With one click, you reach all the linked activities, tasks etc... The activity history provides at a glance all the most important information as type of the activity, contact, linked documents and follow-up actions.



Documents management

Enterprise-wide information management

SMARTCRM is your complete documents management. You can easily store and retrieve your whole correspondence with your customers in the system: letters, reports, memos, e-mails with all attachments etc...

With regard of a consistent image, you can create and use per default enterprise-owned templates.

The storage of documents can be address or project related. Thus, you always get at a glance the CRM processes that you need.

SMARTCRM integrates and serves all information canals. You can write e-mails with attachments directly from the system and send them with, for instance, Microsoft Outlook or Lotus Notes as well as process correspondence with letter and fax via Microsoft Word or Excel.

Via the integrated CTI interface, you know immediately for every call with whom you have to deal with.

License model for SMARTCRM

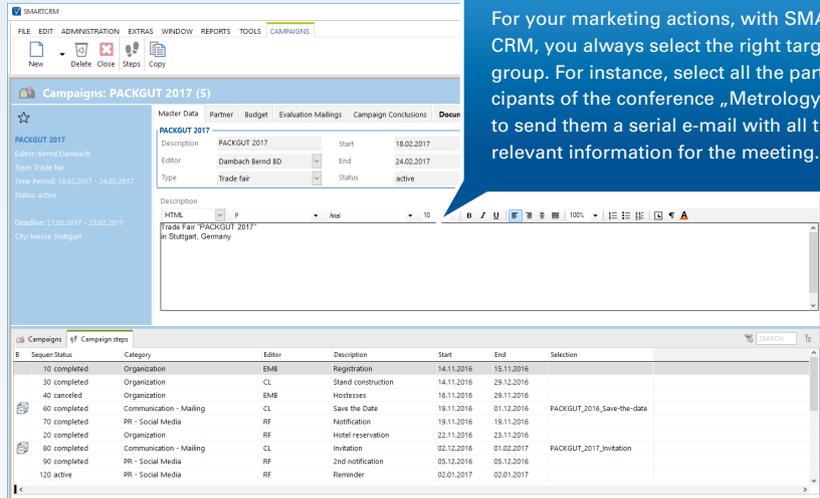
For the back office, SMARTCRM licenses with the concurrent model user. In addition, there is a special license for the field service which is designed according to the named user model. Thus the CRM data can be used without an Internet connection offline, e.g., on a notebook. As soon as the access is again possible, the data are updated automatically.

Campaign management

Reaching the right people in the right tune

A highlight of SMARTCRM is the efficient campaign management, with which you plan, document and evaluate every steps of your marketing or sales campaign. You always keep track of your budget thanks to the plan-actual comparisons. You document as well the quotations and contracts of partners or suppliers, such as hotels, communication agencies or stand builders. Thanks to precise selection tools, you increase from the start the chances of success of a marketing campaign and limit the unnecessary wastage. In SMARTCRM, you can set detailed selection criteria and combine conditions for all customer and project-related information, for instance:

- Contacts in a given function who were not contacted for the last action
- All prospects from the industrial sector



For your marketing actions, with SMARTCRM, you always select the right target group. For instance, select all the participants of the conference „Metrology“ to send them a serial e-mail with all the relevant information for the meeting.

- All customers who have not been called by a sales representative for the last 3 months.
- With each additional inserted SMARTCRM module, such as Sales, Machines or Projects, you increase the information about your customers and prospects and thereby optimizing the targeted approach.
- You can manage mailing lists so that they can only be used for the dispatch

of Newsletters or product announcements.

The selections created within a campaign can be directly linked to the corresponding campaign step.

The creation of mailing letters (with Microsoft Word) and serial e-mails is just as comfortable as the evaluation of its feedback.

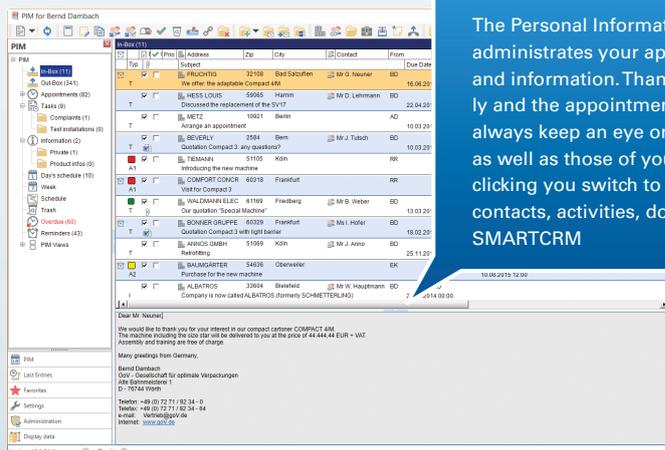
Personal Information Manager (PIM)

Well planned, well informed, well prepared

The personal information manager (PIM) is the appointment and task manager in SMARTCRM, but also the communication tool between field service, back office and the other departments in the enterprise. You find all important appointments and open tasks in the overview so you can align your planning accordingly. Using the substitution function, the tasks and appointments are transferred seamlessly to the substitute colleague. Moreover the PIM is an active communication tool for the whole company. This way, you can, for instance, point to upcoming sales or marketing actions or

inform on imposed refusal to supply certain customers. So all CRM participants kept promptly up to date and are better prepared for customer contact. Additionally the PIM can be used as a

“compass” for the navigation through SMARTCRM. By clicking you can reach all background information you might need: addresses, quotations, reports, etc...



The Personal Information Manager (PIM) administrates your appointments, tasks and information. Thanks to the daily, weekly and the appointment schedules, you always keep an eye on your appointments as well as those of your colleagues. By clicking you switch to the linked addresses, contacts, activities, documents, etc... in SMARTCRM

SMARTCRM.Basis Technical Features

Address Management

- Addresses' categorization and classification
- Assignment of customer representatives e.g., according to the zip code, field service / back office
- Duplicate check
- Any number of contacts per address, including office / private address and responsibilities, e.g., power of decision, tasks
- Warning such as delivery block, special discount
- Documentation of all activities: quotation, visit reports, e-mails
- Assignment to conversations
- Visualization of multilevel corporate hierarchies, including activities and sales revenue information
- Mapping of relations of addresses / contacts
- Mass processing of selected addresses, contacts
- CTI integration with caller ID
- E-mails: Automatic / manual import of incoming e-mails as well as e-mail dispatch from SMARTCRM via Microsoft Outlook / Lotus Notes

Personal Information Manager (PIM)

- Dispatch of internal information
- Tasks and resubmission management
- Maturity monitoring for own and delegated tasks with priority

About SMARTCRM

Since 1992, SMARTCRM GmbH is successful with its own development for sales, marketing and service. The company offers with the eponym product SMARTCRM a complete CRM solution (Customer Relationship Management). With more than 14.000 users in European small and medium sized enterprises, SMARTCRM has already proved its excellence.

SMARTCRM GmbH completes its software solution by consulting and system analyze, customizing installation as well as comprehensive user and administrator trainings. Dedicated employees ensure the continuing development of SMARTCRM as well as comprehensive customer support.



SMARTCRM GmbH
Simply **MORE** success

- Scheduling with reminder function (Relative reminders)
- Resources planning
- Direct link of appointments / tasks / information with address / contact / activity
- Depending on used modules links with projects, reclamations and machines
- Substitution management
- PIM per Mail: dispatch of tasks / appointments / information to external staff

Campaign Management

- Documentation of campaigns and any number of campaign steps
- Plan-actual comparisons of budget
- Documentation of partners etc.
- Approval workflow
- Evaluation of the feedback
- Establishment of mailing lists
- Saving of the selection conditions in user-specific profiles
- (Time delayed) dispatch personalized mailing letters / serial e-mails (Text / HTML format, with attachment)
- Duplicate check before serial e-mail dispatch
- Preparation of the address information for further utilization in third-party systems

Tour Planning

- Assigning addresses to tours
- Planning for any date

- Simultaneous automatic creation of activities and appointments for the field service employees
- Documentation of the visit reports

Work SMART

- Multiple selection possibilities, e.g., for addresses, sales revenue
- Full text and wildcard search
- Any number of combinable search criteria
- Documents templates, e.g., letters, minutes
- Version control of documents
- Interface to Microsoft Office
- Export of contacts, e-mails and appointments from / to Microsoft Outlook / Lotus Notes

Administration

- Extensive rights management
- Read access to appointments / tasks of another user
- Free definition of data exchange conditions
- Data exchange between Central / Notebooks respectively filial, processed via e-mail, VPN
- Compressed and encrypted data exchange packets
- Recording of all changes as well as import and export
- Reorganization, repair, data backup
- Delivery of updates via data exchange

Are you planning a CRM implementation?

You can contact our customer care at:

+49 7275 98866-0

We are looking forward to talking with you!

