CRM
by HansaWorld

Contact Relationship Management

True integration
Tightly integrated with ERP, no data duplication

Mobility
Access all key data any time, anywhere

Pipeline management
Plan and manage your future opportunities

Integrated telephony
Make calls from relevant system records, route inbound calls based on system data/rules

Workflow management
Trigger authorisation requests, emails, SMS and pop-up windows yourself or from the system

Graphical time management
Graphical scheduling and calendars, time and attendance

The World's Best Integrated Business Platform

Manage customer relationships and the efficiency of your sales staff

Offer better customer service by using powerful pipeline management, segmentation, up-selling and cross-selling possibilities. HansaWorld CRM is affordable and easy to use.

Contact Management

Standard ERP has a single register for all organisations with which you do business, whether they are customers, suppliers, prospects, press, trade bodies or anything else. People at organisations are also stored in the same register. You can relate as many people as you want to a single company. Store data such as people's multiple contact details, their job description and generic function, salutation information and the like. Contacts register is accessible by all parts of the system, so you can sell to your suppliers, buy from your customers, repair equipment for press contacts and the like. Standard ERP supports a wide range of detail being saved against the Contact record, including main address details, main delivery address, switchboard numbers and other contact information. Interfaces exist to popular post code addressing software for fast data entry of addresses.

"Using the CRM functionality we have categorised our customers and now can instantly see the source of our income and where to focus in the future."

Patrick Verryn, CWM

Contact records can be categorised using Standard ERP's Category and Classification tables, which are defined by you. The Classification field supports more than 20 levels of such analysis, so you can break down these records by marketing source, region, industry, size, and whatever else is an important measure for you. The Category and Classification fields are available as selection criteria for reports (for example, turnover/profitability for customers that replied to a particular marketing campaign), and batch routines such as mailshots/emailshots. In addition, Standard ERP provides 11 user-defined fields of different types.

Quotations/Pipeline Management

Quotations are entered to Standard ERP in an identical fashion to sales orders. All details that can be stored for a sales order can also be stored for a quotation.

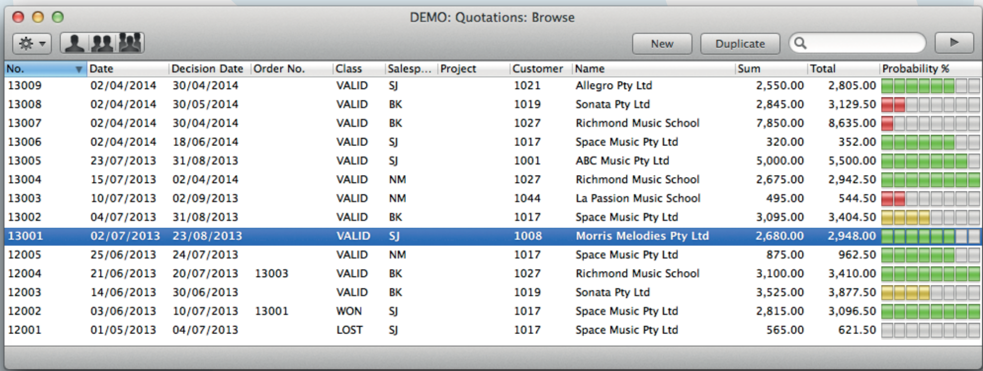
Once created, quotations can be printed to a user-defined form, and to PDF or HTML using Standard ERP's email engine.

At any time, new sales orders can be created from quotations, singly or in bulk, with the same details, using a simple menu command. Also a job/project can be created from a quotation and the budget for that project. If required, a pro-forma invoice can be printed directly from a quotation. Original quotations are retained even after conversion to a sales order for analysis and lookup.

Quotations can be classified by type, and Standard ERP allows analysis of which Quotations are open, accepted or rejected. In addition there are fields for expected decision date, next action date, and probability. Reporting includes all open quotations, conversion rates by salesperson and type of business, estimated value statistics, and information on the length of sales cycle and average values by various criteria.

Time Management and Scheduling of Resources

Standard ERP's Calendar functionality is centred around diary entries called Activities, which allow the user to record details of what to do when. Tasks can be given sub tasks, for management of more complex administration, and prioritised.



No.	Date	Decision Date	Order No.	Class	Salesp...	Project	Customer	Name	Sum	Total	Probability %
13009	02/04/2014	30/04/2014		VALID	SJ		1021	Allegro Pty Ltd	2,550.00	2,805.00	
13008	02/04/2014	30/05/2014		VALID	BK		1019	Sonata Pty Ltd	2,845.00	3,129.50	
13007	02/04/2014	30/04/2014		VALID	BK		1027	Richmond Music School	7,850.00	8,635.00	
13006	02/04/2014	18/06/2014		VALID	SJ		1017	Space Music Pty Ltd	320.00	352.00	
13005	23/07/2013	31/08/2013		VALID	SJ		1001	ABC Music Pty Ltd	5,000.00	5,500.00	
13004	15/07/2013	02/04/2014		VALID	NM		1027	Richmond Music School	2,675.00	2,942.50	
13003	10/07/2013	02/09/2013		VALID	NM		1044	La Passion Music School	495.00	544.50	
13002	04/07/2013	31/08/2013		VALID	BK		1017	Space Music Pty Ltd	3,095.00	3,404.50	
13001	02/07/2013	23/08/2013		VALID	SJ		1008	Morris Melodies Pty Ltd	2,680.00	2,948.00	
12005	25/06/2013	24/07/2013		VALID	NM		1017	Space Music Pty Ltd	875.00	962.50	
12004	21/06/2013	20/07/2013	13003	VALID	BK		1027	Richmond Music School	3,100.00	3,410.00	
12003	14/06/2013	30/06/2013		VALID	BK		1019	Sonata Pty Ltd	3,525.00	3,877.50	
12002	03/06/2013	10/07/2013	13001	WON	SJ		1017	Space Music Pty Ltd	2,815.00	3,096.50	
12001	01/05/2013	04/07/2013		LOST	SJ		1017	Space Music Pty Ltd	565.00	621.50	

Each Activity can be marked as to whether it will appear in the Calendar (date and time based graphical entries) or in the To Do list (simple list of tasks to perform).

Standard ERP's Calendar is a team-based system, rather than personal - you can review other people's diaries, and if necessary look at more than one diary at a time to see when several people are available.

Different types of work can be colour-coded, making it easy to see how everyone is planning or spending their time. Entries can be made for planned time and compared to actuals and separate budgets can be prepared to see whether enough time is being spent on a particular type of work. The graphical nature of these features enables easy employee chargeability monitoring, as you can immediately see who is performing at their best. In Calendar, you can view up to three people's diaries simultaneously by day, week or month.

"With the help of Standard ERP's Task Manager and Calendar we can really plan our time better. It helps us to monitor each other's tasks, delegate and prioritize our daily workload."

Ara Darakjian, Darakjian Jewelers

If you have a group of employees (or subcontractors) who you need to schedule in advance, then multiple diaries can be viewed simultaneously from Standard ERP's Resource Planning module. You can create multiple views of who appears on which screen (by office, region, project etc), and you can drag and drop bookings between people (which reassigns who will be performing work).

As with the Calendar, double-clicking on an entry in the Resource Planning module drills down to the underlying Activity, allowing review and editing. Activities can be allocated at any time against Projects, with Items also associated with the work - this allows information to be stored on rates, type of work and the like. When Activities are marked as done, these can post time directly to Job Costing, without the need for separate timesheets.

To Do Lists

Each person has a To Do list made up of Activities marked as To Dos. This allows genuine groupware functionality, since users can view the To Dos for other people (for example when they are off sick). Each To Do list can be filtered on multiple criteria, to allow you to work only with the tasks that are relevant: for example, you can run through your phone calls, or your Priority 1 tasks, or everything you need to do for a specific customer. To Dos are viewed from a central Task Manager, and drill-down is available to allow the user to open the underlying Activity.

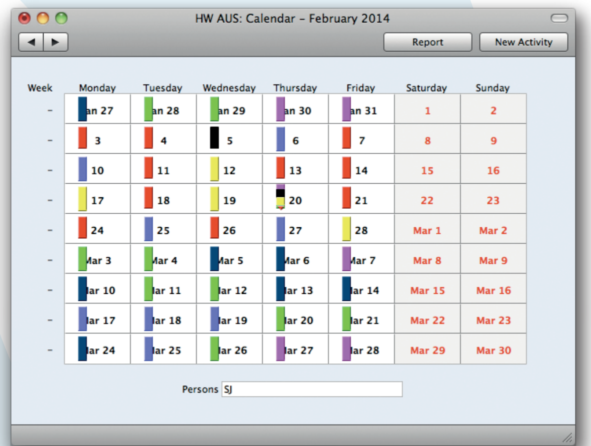
"We now have greater visibility at a glance to see where sales people are spending time and can measure the return our business is getting from this."

Michael Gigliotti, Time Out Sydney

Activities can be connected to any other record in Standard ERP by drag-and-drop. In most cases the activity gets linked automatically to the record from which it was created. As a result Activities become the triggers for doing anything within Standard ERP: credit controllers can use Activities linked to Invoices to remind them what excuses a customer has already given; warehouse staff can use Activities linked to Picking Notes to include packing information; designers can use Activities linked to Projects for all the non-numeric Job Bag details. Reporting and cross-referencing links in Standard ERP allow any user to see the full picture.

Workflow

Activities can be generated automatically as a result of sending a letter, quote or entering into a contract. Thus, for any customer, a complete history of transactions and communications is instantly viewable on screen including what has been done and what is yet to be done. True workflow management can be achieved with a feature which allows Activities to be generated automatically as a result of completing other Activities with a specified code. For example, marking a credit control Activity as completed with a "Cheque is in the Post" result might automatically create another Activity in three days time to check the post and chase the customer again if the cheque is not received.



You can set Alarms on Activities to prompt you to complete them at a given time and date - these can open as pop-up windows, or send them as SMSs or emails.

Alternatively you may want Standard ERP to trigger the creation of a pop-up window, SMS or email on a given event. These are set in the Business Alerts module. For example, Standard ERP can trigger:

- a SMS to customer notifying them that their delivery has been shipped
- an email to a manager alerting that a Quotation falls below the minimum GP allowed
- an email to the project manager alerting that the job budget has been used up.

Customer and Supplier Dashboard

Use the Customer Status report and Supplier Status report to give you a 360 degree view of all interactions with a customer, prospect or supplier. Based on user-definable rights, the user can be allowed to view:

- all the Activities for that customer (if necessary sorted by type)
- sales ledger history
- items purchased, with prices paid
- turnover for a given date range
- value and status of quotations
- value and status of orders

Add to this details of Projects and Project Budgets, Rental Agreements and Reservations, Service Orders and Worksheets, and Contracts, and you have all the information you need. Everything is accessible, for example allowing you to inspect an open Order, then run an Order dashboard (Order Status report) to review associated deliveries, invoices, returns and Activities.

"The CRM solution has significantly improved the way we serve our customers"

Arnas Sirutis, Databalt

Letters and Mailings

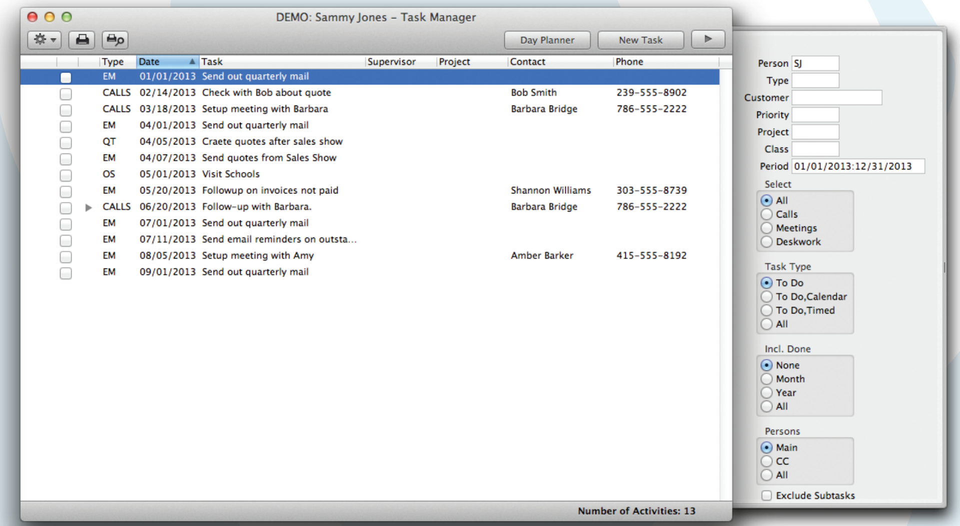
Standard ERP allows you to create standard or ad-hoc letters, which can be printed for individual or selections of customers, or prospects.

Each letter gives you control of the greeting (Dear Sir/Madam, Dear Jim and the like) and heading. In addition, you can create paragraphs of standard text, and bring them in to any standard letter with a single code. The letter list will show the proposed recipients of a mailing before you proceed, allowing you to change your selection criteria. As well as creating printed mailshots, the Customer Letter functionality can be used to send out email - and fax shots to selected groups of customers/ prospects/suppliers etc.

Reports and batch routines can be used to improve targeted mailshots. For example, use the Who has bought/not bought report to find customers who have bought (or not bought) a particular item within a given date range, and run mail campaigns with this information to offer upgrades or cross-selling of other products.

Collaboration

Keeping track of a discussion by e-mail can be a challenge. You have to make sure the right people are included in every mail's recipient list and either separately copy every e-mail to a certain folder or be ready for long and frustrating searches later. With Standard ERP the whole debate is saved in one place. You can choose either to have discussions inside one mail or to create a specific conference. In both cases it is possible to attach files and see who has updated, read the posts and deleted the mail.



Knowledge Management

Store copies of mails, whether internal or external, to multi-level personal archives if no one else needs access, or to Conferences, for secure archiving and quick access. Your company defines the folder structures in Conferences, creating logical places to store and retrieve any data worthy of sharing. Access rights can be set at the Conference level - for example at Board level for a Board conference containing minutes of meetings and key strategic decisions. Store external files against any mail at Archive or Conference level - creating a logical location for any of your data. Use Standard ERP's search engine to find any content in Conferences to which you have access.

Integrated Telephony and Communications

HansaWorld offers the ability to communicate with customers from inside the Standard ERP application. You can select the Business Communicator from any customer- or supplier-facing record within Standard ERP, which then allows you to initiate emails, SMSs and telephone calls with the company or individual, and even open a map of their location. Emails and SMSs open relevant records in Standard ERP, where you enter details. Telephone calls interact with VoIP switchboards to make the call - these can include Skype, Asterisk and most switchboards with TAPI 2.0 drivers. Once the call is answered, Standard ERP opens an Activity record to allow the user to record details of the call.

Standard ERP's integrated telephony also supports inbound intelligent routing. The switchboard passes Standard ERP the telephone number of the caller, and the program instructs the switchboard how to route the call (for example to the salesperson in charge of the account, or to accounts if there is an invoice overdue from the customer). You can set rules for routing using HAL (Hansa Application Language).

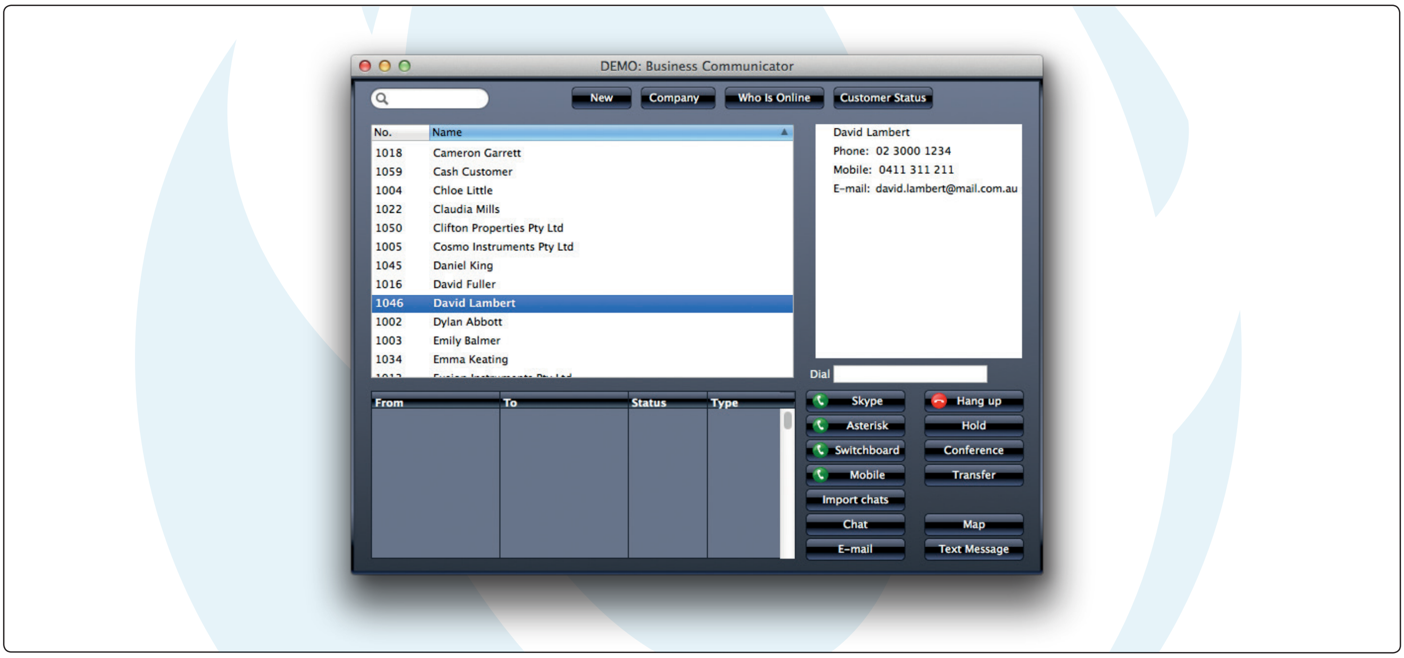
"Business Communicator makes it easier for our people to receive service orders and follow the communication history of customers, suppliers and partners. The possibility to initiate a call straight from the orders will make our customer service much more efficient."

Finnish Q3 Group

Interaction with Standard ERP by HansaWorld database

CRM features interact with all other parts of the database. Typical examples include:

- attach Activities to open Invoices to store credit control details
- Activities in the Calendar/Resource Planner can automatically create Job Costing entries
- generate Service Order records for repairs identified by your Call Centre



Modules

- Business Alerts
- Cash book
- Checks
- Conferences
- Consolidation
- Contracts
- Course Booking
- Credit Management
- CRM
- Customs
- Data Integrity
- EDI
- Email
- Expenses
- Fax
- Fixed Assets
- General Ledger
- Group Calendar
- Hotel
- Human Resource Management
- Internal Inventory
- Inventory
- Jewelry
- Job Costing
- MRP
- Payables
- Point of Sales
- POS Offline
- Pricing
- Production
- Purchase Orders
- Quotations
- Receivables
- Rental
- Report Generator
- Resort
- Resource Planning
- Restaurant
- Sales Orders
- Service Orders
- Share Trading
- SmartView
- (Business Intelligence)
- Task Manager
- Telephone Log
- TimeKeeper
- Warehouse Management
- Webshop and CMS

Technologies

- Business Communicator (Asterisk, Skype and TAPI)
- Forms Designer
- HAL Customisation language
- Intelligent Routing
- Interfacing Toolkit
- Massive Cacheing
- SQL Shadowing
- SmartApps Designer
- Wide-area Networking

Cloud Based Services

- Address Lookup
- Credit Card Payment
- Credit History
- E-invoicing
- Electronic Bank Services
- Electronic VAT Return
- Exchange Rate Lookup
- Postcode Lookup

Company profile

HansaWorld is the first major software house to provide a full suite of Enterprise Resource Planning, Financials and Customer Relationship Management as well as a wide selection of industry-specific solutions on tablets and smartphones. HansaWorld shows continued technological leadership in the international business software industry.

The group employs around 300 staff in a strong network of daughter companies and distribution partners covering over 110 countries on all continents, allowing HansaWorld to offer international implementations with a single point of contact across many countries. The solutions are available in more languages than anyone else, run on all major platforms and support mobility via laptops, the latest tablets and smartphones. More than 79 000 installations world-wide reinforce us as a global leader.

HansaWorld continuously invests in R&D to provide innovative and future proof solutions to help businesses run efficiently and smoothly, combining 26 years of experience with global knowledge and local representation.

Product Strategy

Standard ERP's advanced and successful user interface was first developed for Apple Macintosh in 1988. In 1994, when the program was ported to Windows, it had already been proved by thousands of users. HansaWorld's experience with international sales and modern technology puts it in the perfect position to meet the challenges of the next decade.

HansaWorld provides a wide range of technologies for e-business including internal and external email, several webshop solutions and PDA support. In addition, HansaWorld can help to build a corporate portal. Standard ERP is developed using C++ as its programming language, and proprietary technology for database design and for network communication. This allows HansaWorld to have the same products available for several different operating systems, each version optimised for maximum performance.

Currently Standard ERP is available for Windows 2000–XP, including Windows CE, Mac OSX, Linux and AIX, Symbian S60 and iPhone.

Certified HansaWorld Business Partner

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