

Spotlight - CRM

Preparation if using demo data attached

1. Import Demo Data
2. Login with
Standard ID: sample@hansaworld.com
Passworld: Sample99
3. Drag Customer letters register on your Personal Desktop (if not there yet)

SCRIPT

Welcome to this short presentation of the CRM module in Standard ERP :)

All successful businesses big and small, require workflows to keep track of activities, reach their desired results and achieve their goals. With Standard ERP's CRM module everyone in your company can have their own workflow overview, tracking anything from invoices and payments

... to tasks, leads and quotations

ACTION: Open workflow overview with date: 06/27/2013:07/27/2017)

With drill down capability you can easily open important records such as quotations directly from the workflow overview.

**ACTION: Open first activity in WON column
Open customer status from operations menu on quote**

Knowing your customers, suppliers and other business contacts is crucial to any business. Simply run the customer status report where you can quickly get a 360 degree view of customer activities and evaluate the entire history of your contacts in one powerful report!

**ACTION: Scroll through customer status report to show info, open one activity
Go Back to Navigation Centre**

The CRM module also allows us to keep customers up to date with new product information and exciting offers!

ACTION: From Navigation centre>>Switch module>>CRM>>Click on registers >>Customer letters OR have link to Customer letters register on your Personal Desktop and open it from there

Using customer letters in the CRM module you can easily send emails to your entire customer base

ACTION: mark * in customer field

or targeted emails for customers within a particular category such as region or industry

ACTION: show Customer Category field OR Paste special customer category RET

Simply type your message

ACTION: Go to Text tile

Or attach styled HTML documents

ACTION: Show attachment and highlight body.html

Send your email and you've reached out to customers in seconds :) It's really that simple !!

ACTION: Show operations menu >> send email

These features, combined with the extensive reporting built in the Standard ERP enables you to make the right decision for your business with accurate information at your fingertips. Standard ERP's CRM is an efficient and cost effective way to increase your sales and deliver superior customer service"

ACTION: Show report list in CRM module - then back to main window