Demo - SERP - CRM Module

Preparation

1. Import provided Demo Data
2. Login with:
   Standard ID: sample@hansaworld.com
   Password: Sample99
3. Download, unzip and copy "Attach.zip." content to "Attachments" folder which is in SERP root folder.

Script

Whether you are a small company or a large enterprise, knowing your customers allows you to provide them with a better, more positive customer experience.

Standard ERP makes it possible for all employees to provide that high level of service with access to the same customer data.

> **ACTION:** choose "Contact: Against All Odds Trading Co" from the Personal Desktop. In contact card press Operations menu >> Customer Status

The Customer Status Report gives access to all information related to a customer in a single report.

> **ACTION:** Briefly go through Organization, Classifications, Related Contacts, and Activities

See Contacts and classified business details. Every interaction is recorded using an activity record and can be seen here.

> **ACTION:** Click on Activity class "SALES". Close. Then press on Activity class "SUPPO". Close

Having CRM integrated with your entire ERP system allows even more visibility.

You get a 360-degree overview of your customers, including turnover, outstanding invoices, sales orders, quotations, contracts and much more.

> **ACTION:** Scroll down showing Sales Ledger, Quotations, Monthly Balance, Sales Orders, and Contracts

Customers tend to prefer a single point of contact and, when that person is unavailable, the customer has to work with someone new. When this happens, customers and suppliers often have to start afresh with relationship building and this can, in some cases, lead to an unhappy customer.

With Standard ERP's Customer Status Report, all of the customer's history can be tracked in one place, and it's easy to learn buying trends, account information, current deals, and other important statistics. All during the customer call.

Let's take a look at how easy it is to follow up on a quote when a customer calls.

> ACTION: Show communication center window with customer "New World Import/Export Co" contact details. Open Customer Status report for this customer

As you can see, the system recognizes the customer and opens the Customer Status Report.

This customer has accepted the quote. Asks to increase item quantity from 12 to 20, and a 5% discount is applied for the larger volume agreed to earlier.

> ACTION: In the Customer Status Report find and open quotation Nr. 21100015. Open heart-beet icon and see activity about a 5% discount that was saved previously. Close it. Edit quotation by increasing quantity from 12 to 20 and adding a 5% discount. Change the quotation status to Accepted and Save. Create Sales Order, Save

Notice it took a few seconds to make these changes and the customer is satisfied with the quick and painless service.

The latest interaction with the customer has now been recorded and will be available on the report after refreshing.

> ACTION: Refresh the report and show that new Order was created, also quotation status changed to Accepted

Having all the data in one system simplifies how different departments, such as sales, marketing, and store locations, interact with customers.

> ACTION: Choose the "Stock list" report from the personal desktop. Run the report for the item 10106 "Car CD/MP3 player"

Here, the product manager notices that there is still a lot of inventory available for sale for Car CD Players and this product is about to go off the market. They need to move this inventory as soon as possible.
He notifies the Sales Manager who decides to reduce the price of the Car CD Players for a quick sale and task marketing with sending a special offer email to all customers who have not yet bought this item.

> ACTION: Module CRM, run 'Who has bought/not bought report'. Set period for the 2018-2019 year. Add item 10106. Mark "who has not bought". Run

With Standard ERP's built-in CRM, it's quick and easy!

Simply run the "Who has not bought" report and filter for the customers to be targeted for this promotional sale.

Directly from the same report, classifications can be added to these contacts to ensure they're targeted as mail-shot recipients.

> ACTION: From the same report window click "Add Classifications to Customers". Enter "CD" to the Add Classification field. Run. Click on customer 002 and show that the classification has been added. Close

That's it. They can now send an email to those customers.

> ACTION: Module CRM. Open Customer Letters register. Open record nr. 13 "Car CD Player sale out promo". Add classification "CD". Save. Show mail body in a Text flip. Press Operations menu>Letter List Show mail recipient list. Keep the Letter List report open Select the Customer Letter record window. Press Operations menu>Send Email Close Customer Letter record window. Close Registers list window. Leave Letter List report window opened

Once the email is sent, the sales manager can do a followup.
And as you can see, with Standard ERP, it takes just a moment to create a task for this.

> ACTION: Press on task manager in NC. Create a new task. Add text "Follow up with car CD player promo. Add LD as a person. Link Letter List report (which was left open) to the activity. Save

As soon as the salesperson logs in to Standard ERP, he sees the new task with all the required information linked to it.

> ACTION: Log-Off. Log-in with User LD (LD@hansaworld.com, no password) Open task from task manager pop-up window. Open Letter list report that is attached. Click on the customer 002

For more efficient calling, Standard ERP has an integrated telephony system that allows you to make calls directly from your ERP system.

> ACTION: Click on the Communication center icon. find contact Nr. 002. Initiate a Call

Calls can be made from most record windows.

The phone number is automatically detected, from the contact information on file.

Every time a call is made, an activity record is automatically created and records who called whom. The employee can simply enter a short text about the actual discussion.

ACTION: Create an Activity record for the customer 002

Let's see how it works!

The customer shows interest in buying the Car CD Player but asks for an additional discount.
The sales person makes note of this and requests approval for the discount from the sales manager to close the deal.

ACTION: Write text "Customer is interested to buy 30pcs but asks for an additional discount" in the activity, add person AM, add type Sales, mark as Done and save

As you can see, all communication with the customer was logged seamlessly and the information is immediately available in the Customer Status Report.

ACTION: Open Customer Status Report for the customer 002 straight from the communication center. Show the newly created activity

Standard ERP's integrated CRM allows full visibility, across all departments, ensuring customers receive the best possible experience.

Thank you for watching this demonstration of how you can stay ahead of the competition and maintain customer satisfaction with Standard ERP's comprehensive and built-in CRM system. For more information, please contact your local HansaWorld partner.