



CRMplus – (Profile)

True Books® Customer Relations Management System, “CRMplus” is a comprehensive approach to any kind of organization's philosophy of dealing with its customers. The application comes with several functionalities, which can be personalized with a company's specific commitments. It improves business processes along by maintaining a cross-referenced database of information about products & customers to provide priority & superior services. System incorporates many features including processing all facets of customer enquiry, follow-ups, order processing, generates various alerts & monitoring , reports and is designed to integrate with Financial Accounting. Through its exceptional MIS section, Customer Relation Management System gives instantaneous insights on how your business is performing.

TrueBooks®- Customer Relations Management System can be deployed both in a single user or a multi-user environment. The system is built around very flexible RDBMS technology and can work with Microsoft SQL Server or ORACLE or MS Access as the database.

PRODUCT FEATURES

Customer Enquiry:

- Processes enquiry from both Walk-In and existing customers.
- Zone / Area wise classification of contacts.
- Provision to feed all required details regarding the enquirer.
- If provided details are insufficient, user can design custom designed fields to input data.
- Enquiry Type wise classifications; like Walk-In, Phone enquiry, Field Staff etc.
- Records Employee who has attended the enquiry.
- Provision to enter the Product, on which Customer is interested in.
- Provision to enter expected Purchase date.
- Provision to set the next follow-up date.
- Provision to set the 'remind-me' date.
- Facility to mark whether staff-support is required for further follow-up.
- Can close an Enquiry, if required.



Follow-ups:

- Facility to track enquiries by date, Customer or Product.
- Facility to record the response from Employee.
- Provision to set the next follow-up date.
- Provision to set the 'remind-me' date.
- Records Employee details who has followed up the enquiry.
- Easy to follow-up on Cases if assigned Executive is not available, as the new executive can check the Interaction History, before contacting the Customer / Prospect.
- Facility to mark whether staff -support is required for further follow-up.
- Can close a deal, if required.
- Display of complete Interaction History with all proper details.

Order Processing:

- Unique Invoice Number for each order.
- Facility to enter the amount to be quoted.
- Facility to enter amount confirmed.
- Facility to receive advance amount.
- All required information about Product, Customer etc.

Other utilities

- Setup of Company details.
- Custom Fields setup- to make the users capable of defining their own fields.
- Provision to set Reminders date-wise; user can also specify the priority like High, Low, or Medium.
- Provision to set grace days for reminders.

Alerts & Monitoring

- All Pending follow-ups.
- A single window monitoring screen to check the Reminders, classified by colours.
- All pending Follow-ups and Reminders at the startup.

Reports

- Enquiry Details
- Details of Closed enquiries
- Follow-up Details
- Pending Follow-up details
- Follow-up details based on Enquiry
- Details of Reminders
- Order Details.



Other salient features

- Product Types
- Manufacturer Details
- Product Models
- Product Details
- Employee Details
- Designation settings
- Employee wise Access control
- Zone / Area settings
- Customer classifications
- Frequent feedback setup.

Security Implementation

- User profile setup (creating master details of each user)
- User group permission setup (assigning privileges)
- User group management (modifying the existing privileges)
- User password maintenance (modifying and resetting passwords)

General Features

- Data entry with minimum keystrokes
- Uncomplicated and menu driven screens
- Standard pattern of operation for all screens
- Accessibility of items using both Keyboard and mouse
- Comprehensive Search facility
- Online help to ensure operational efficiency

Printer setup

Dot-matrix, Inkjet and Laser

Additional Options available in the system upon request: -

Data Import / Export

Interoperability with existing systems and databases

Short Messaging Service (SMS)



System Requirements

Software:

Production Servers:

Windows 2000 Server or Advanced Server, Windows 2003 Server Or Greater (We do not recommend that XP be used as a server)

SQL Server 2005, or SQL Server 2005 Express with the SQL Server Management Studio Express or MS Access.

Client Machines:

No special hardware requirements for the client's machine. If the system can run MS office application without problems then it should work fine with TrueBooks applications.. A Local Area Network Connection and a fast Internet Connection is recommended. Client machines will require minimum 5GB hard drive space for the application to run smoothly.

Hardware:

Production Server:

Pentium IV Systems 1ghz + with at least 1GB Ram, 200MB for the Applications

Disk Space (estimated):

At least 5MB for application, 50MB for the starting database, but leave yourself room to grow depending upon your transaction volume.

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Note:

Product Profile is subject to modifications without prior notification.

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