CRM
by HansaWorld

Contact Relationship Management

True integration
Fully integrated with ERP, no data duplication

Mobility
Access Standard ERP, anytime, anywhere and on any mobile device

Pipeline management
Plan and manage business/sales 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 sales staff

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

Contact Management

Standard ERP has a single register for all organisations to do business with; whether they are customers, suppliers, prospects, press, trade bodies or anything else. People at organisations are also stored in the same register. As many people as needed can be linked to a single company and data can be stored such as people's multiple contact details, job titles generic function, salutation information and the like. The contacts register is accessible from all parts of Standard ERP making it easy to sell to and buy from customers and suppliers. Standard ERP allows for a wide range of data/information being saved against the Contact record, including address delivery address, switchboard numbers and other contact information.

"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, Opteon

Contact records can be categorised using Standard ERP's Category and Classification tables, which are fully definable. The Classification field supports more than 20 levels of such analysis, providing the ability to break down these records by marketing source, region, industry, size, and any other business segmentation. 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-definable field types.
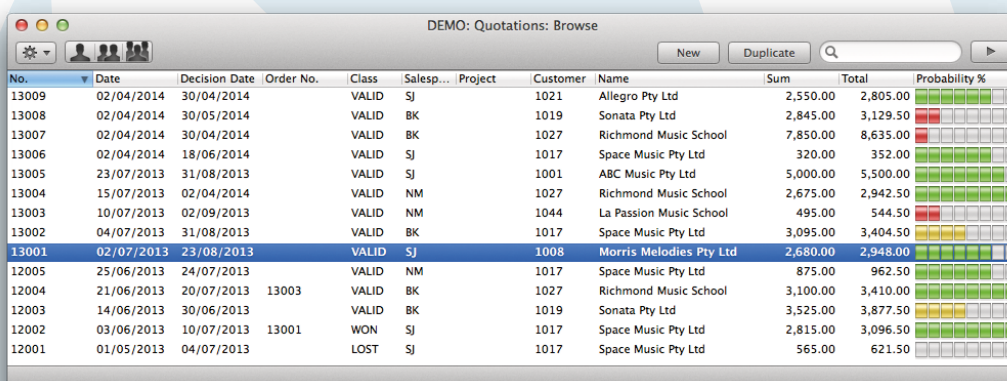
Quotations/Pipeline Management

Quotations and Sales Orders are entered into Standard ERP in an identical fashion; therefore all details that can be stored for a sales order can also be stored for a quotation. Once created, quotations can be printed utilising a user defined form and can also be converted into PDF or HTML.

At any time, new sales orders are created from quotations, singly or in bulk, with the same details, using a simple menu command. A job or project can be created from a quotation and the budget 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.

Standard ERP provides analysis of Quotations classified by type - which 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, type of business, estimated value statistics, 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 and when. Tasks can be given sub tasks for management of more complex administration and can be 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, rather than personal allowing for the review of colleagues 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 color-coded, to quickly see how anyone is planning or using their time. Entries can be made for planned time and compared to actual time. Separate budgets can be prepared to see whether enough time is being spent on particular types of work. The graphical nature of these features makes employee chargeability easier to monitor, as it can immediately been seen who is performing to capacity. There are options to view per day, week and month, whilst being able to review up to three peoples diaries simultaneously in the Calendar.

"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. Resource Planner allows for the creation of multiple views of who appears on which screen (by office, region, project etc), and allows drag and drop activities 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, with the option to review and edit. Activities and Items can be allocated at any time against a Project; this allows information to be recorded on rates, type of work, items used and the like.When Activities are marked as done, they 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.

Activities can be connected to any record in Standard ERP with drag and drop functionaility. In most cases the activity gets linked automatically to the record from which it was created. 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. 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 can automatically create another Activity in three days time to check the post and chase the customer again if the cheque is not received.
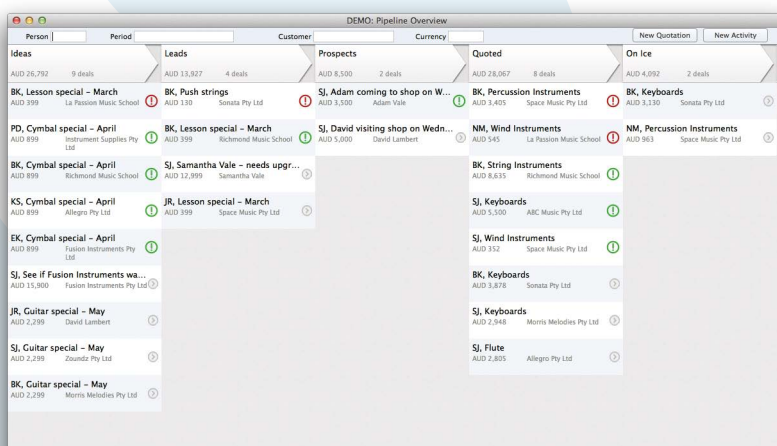
Alarms can be set for Activities and Alerts for any given event; these can open as pop-up windows or have them sent as an SMS or email.

The Business Alerts module provides the functionality to create given event alerts; alarms can be set directly on to an Activity.

- A text message to a customer notifying them that their delivery has been shipped
- an email to a manager alerting them that a Quotation falls below the minimum GP allowed
- an email to the Project Manager alerting them that the budget has been used up.

Customer and Supplier status report

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

- all the Activities for a customer activity history
- items purchased, with prices paid
- turnover for a given date range
- value and status of quotations
- value and status of orders

Users are able to view detailed information for Projects and Project Budgets, Rental Agreements and Reservations, Service Orders and Worksheets, and Contracts; Standard ERP provides all the information needed. The drill down function is available across all records allowing you, for example, to inspect an open Order and then run an 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 for the creation of standard or ad-hoc letters, which can be printed for individual or groups of customers, prospects or suppliers.

Each letter has an editable greeting (Dear Sir/Madam, Dear Jim and the like) and heading. Paragraphs of standard text can be written by the user; these are then automatically entered into a standard letter with a single code. The letter list will show the proposed recipients of a mailing before proceeding, allowing for the change of the selection criteria. As well as creating printed mailshots, the Customer Letter functionality can be used to send out email - and faxes to selected groups of customers, prospects and suppliers. etc.

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

Collaboration

Keeping track of a discussion by e-mail can be a challenge; which contacts should be included, should emails be archived, deleted or saved to a local or global folder and how are those emails then found through searching at a later date?

Thanks to the way Standard ERP saves emails the challenge has been removed. Discussions between contacts can occur within one email, or alternatively, a specific conference can be created where
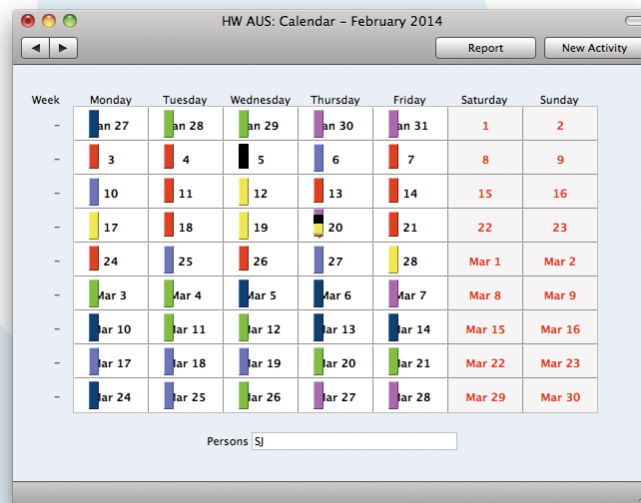
all individual discussions can be stored. Email and conferences within Standard ERP allow for users to attach and easily share files whilst giving the option to view the history of that record (to see who has read, edited or deleted that record).

Knowledge Management

Storing copies of mails within Standard ERP, whether internal or external, to multi-level personal archives or conferences gives a user the opportunity for secure archiving and quick access. The folder structures in Conferences, are fully definable, allowing a company to create logical places to store and retrieve any data worth sharing between users. 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. External files can be attached to any mail at Archive or Conference level creating a logical location for company data. A powerful search engine within Standard ERP allows a user to find content in any Conferences that they have access to.

Integrated Telephony and Communications

Standard ERP offers the ability to communicate with customers from inside the application, by using Business Comunicator. Business Communicator can be launched from any part of Standard ERP that has a customer or supplier record. Standard ERP's Business Communicator has the inbuilt functionality to create emails and SMS, to initiate telephone calls to a contact and even opens up a map of their location. Emails and SMSs open relevant records in Standard ERP, where you enter details. Telephone calls can interact with VoIP switchboards including Asterisk and thouse with TAPI 2.0 drivers. Once a call is answered, Standard ERP opens an Activity record to allow the user to record details of the conversation.

Inbound intelligent routing is supported by Standard ERP's integrated telephony system. A switchboard will pass Standard ERP the telephone number of a caller allowing for correct routing to the relevant user (for example to the salesperson in charge of the account or to accounts if there is an invoice overdue from the customer).

Rules for routing can be set by using Hansa Application Language (HAL).

"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:

- Attaching Activities to open Invoices to store credit control details
- Creating Job Costing entries automatically from Activities in the Calendar/Resource Planner
- Generating Service Order records for repairs identified by your Call Centre
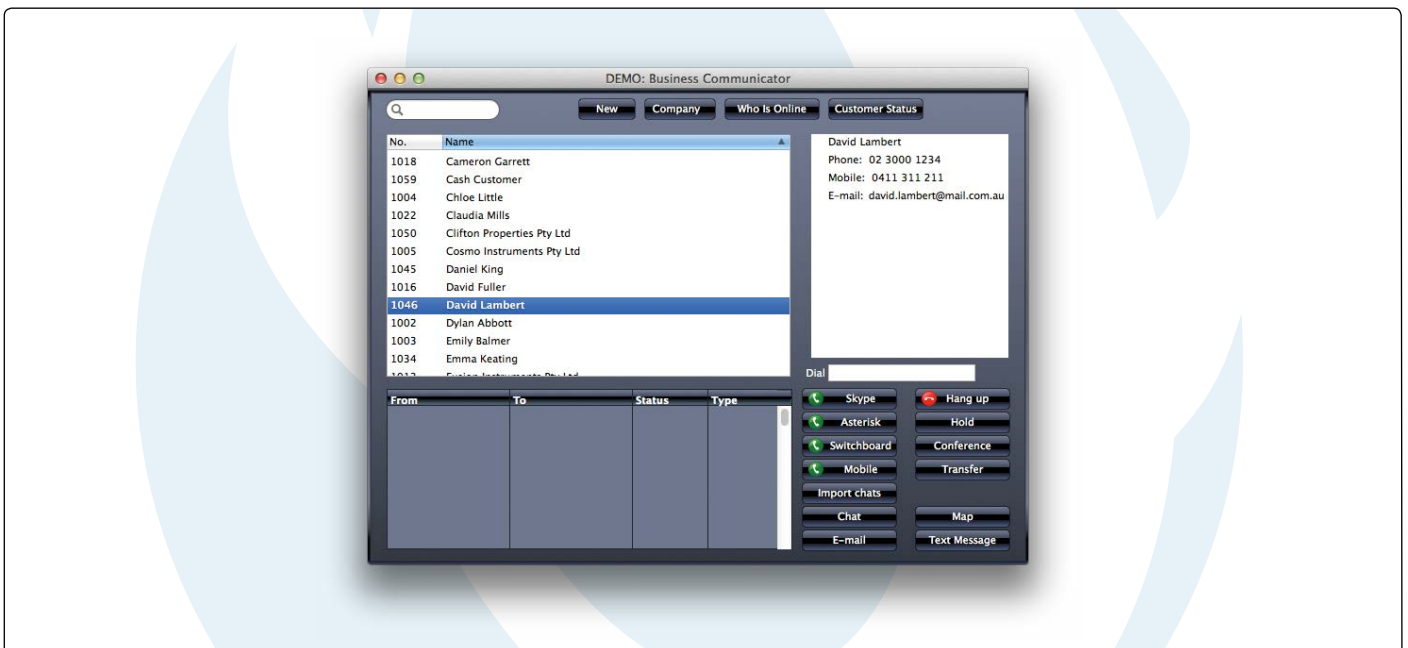
Modules

- 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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