

## Spotlight - CRM

Preparation if using the provided demo data:

1. Import Demo Data (Has a nice Contact letter you can duplicate).
2. Login with User: Sample@hansaworld.com, Password: Sample99
3. Drag the Contact letters register on your Personal Desktop (if not there yet)

Preparation if starting from UK Sample data:

1. Create a couple of quotations for different customers.
2. In the WO, make sure that the customer on the top most quotation in the WON column has recent WO activities which can show up in the Customer Status report. Create some if needed.
3. Create a customer letter text, with 2 paragraphs and an image if possible. An LLM can do that for you. (You will later paste this into a new Contact letter)
4. Alternatively to 3: create a Contact letter as described in this script, with a nice HTML text, which you then can duplicate during the demo.

### SCRIPT

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: 01/01/2018:31/12/2026**

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

**ACTION: Open the first activity from the WON column  
Open customer status from the Operations menu on the Quotation**

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 the Navigation Centre**

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

ACTION: Switch module to CRM>>Click on registers >>Contact letters  
Alternatively, have link to Customer letters register on your Personal Desktop and open it from there

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

ACTION: Create a new Letter (or duplicate Letter 7 from the demo). Mark \* in the Customer field.  
Click checklist 'Customer Main Email' (or letter list will be empty)

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

ACTION: Show Customer Category field and Paste special customer category CUST

Simply type your message

ACTION: Go to Text tile to show message from demo; OR paste the message you prepared. Save.

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 you 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