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CRM

✓ *A complete system that supports all your sales, marketing and services activities. The perfect solution for improving customer acquisition and retention in your company.*

Customer relationships are a key factor in the success of any company. The WinLine CRM (Customer Relationship Management) module manages all your daily processing requirements for activities involving customers, vendors, prospective customers and contact persons.

CRM ✓

Preconfigured dashboards, so-called Cockpits, are specially configured for organizing and providing access to key tasks for various user roles in the areas of sales, marketing, services, and management. Cockpits give you access to many kinds of actions and reports like To-Do lists, customer/vendor address lists, sales statistics and other often used information. Your employees can use one of the nine available cockpits to handle customer and vendor service requests. Each cockpit can be individually configured to meet the user role being exercised for a specific company process.

Using the Mobile Connect product line, you can provide access to data from WinLine CRM on a smart phone or tablet. This lets you process customer inquiries while underway and enter data directly to the WinLine ERP/CRM system from your mobile device. Take advantage of real time, online processing by means of an app on your mobile device*. Mobile data processing offers you the flexibility that will increase your productivity, sink costs, and make you more competitive.

* Available for iPhone, iPad, Android and Windows Mobile

WinLine CRM is one of the core modules in the ERP package. WinLine CRM supports your daily activities in the sales, marketing and services areas:

+ Integration with WinLine ERP software
+ Improved customer relationships
+ Increased customer loyalty
+ Long-term customer retention
+ New customer acquisition
+ Reports for customer and prospective customer purchasing behavior
+ Sales campaign management
+ Services process management
+ Centralized access to all customer and project data

**More information on CRM-Customer Relationship Management can be found at www.mesonic.com.**

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OPERATE SUCCESSFULLY

✔ *CRM is a relevant topic in many different areas in your company. It automates processes to improve efficiency and accuracy in the completion of many kinds of daily tasks.*

CRM IN SALES

The WinLine CRM system supports your sales force across a whole spectrum of sales activities. By means of direct access to all relevant customer data, your sales personnel can take quick advantage of any sales opportunity that presents itself. Integration with other WinLine ERP modules provides speedy, up-to-date information on product stock levels, delivery dates, customer discounts and payment terms.
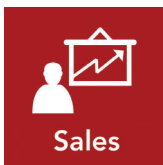
Sales

Analyze the historical purchasing behavior of your customers and their potential for future sales. This promotes not only more customer satisfaction, it also achieves more sales turnover!

Contact History and Acquisition
Contacts are the most valuable asset for a sales department. WinLine CRM gives you access to the current status and the complete history of a contact record. Using this information, you can organize many kinds of current and future sales activities, such as follow-up offers, discounted offers, and much more.

Using the integrated TAPI interface in WinLine you can call a listed contact simply by clicking on a hyperlink on the screen. Remarks from telephone conversations can be entered on-the-fly to ensure that no information is lost along the way.

Lead tracking
Lead management and sales status monitoring are crucial activities in your daily sales activities. Sales turnover is achieved through the successful utilization of sales opportunities. WinLine CRM supports your sales force through the entire process from the initial sales acquisition, to the placement of offer, and the final closing with a sales order. During the acquisition phase, you can use detailed sales funnel reports to decide which proposals should receive the most attention.

Dates, Lists and Tasks
Generate and filter your CRM data using user-defined lists to set up automated customer birthday greeting actions, for instance, or send invitations to open house events, send follow-up offers for new product upgrades and models. All lists can be output in both tabular and graphical format and can be exported to Microsoft Excel for further processing. Lists can also be inserted for use in the WinLine Cockpit where they are automatically updated when the underlying data is changed in the background.

Create your own personalized To-Do lists containing all pertinent information on upcoming dates and tasks. Even better, benefit from the integrated interface with MS Outlook and MS Exchange to synchronize your WinLine contacts and events with the corresponding Microsoft application.

Selected functions:
+ Improved contact quality
+ Access to customer history
+ Sales potential analysis (cross/upselling, new sales)
+ Customer sales turnover history
+ TAPI interface for telephone sales campaigns

CRM IN MARKETING

CRM plays just as large a role in marketing as in sales. The organization and handling of sales campaigns aimed at specific sets of customers, with associated actions such as customer newsletters, serial emails and faxes are just a few of the activities that can be conducted in the WinLine CRM module.

Targeted customer groups
You can mine your customer and vendor data in WinLine to create lists of customer and vendor accounts, contacts, and sales reps that are used as the basis for your marketing actions. Powerful, but easy-to-use filter and selection methods allow you to select customer records by combining various kinds of customer information such as zip code, region, sales rep, previous purchase statistics and many other kinds of factors to produce a selection profile that is used to generate a sales campaign list.

Sales campaign procedures
Once the sales campaign customer/vendor list has been set up, you can create and send a marketing message as a MS Word document or email directly from WinLine.

You're free to format your messages as RTF text blocks and include documents for attachments, or you can alternately send your message as a html document. Using the integrated sales campaign list, your message is automatically sent to all the customer records contained in the campaign list. Integration with the WinLine Archive module and associated workflows from the CRM module round off the activity to let you document and record the message transmissions for tracking and reporting purposes.

Press Releases
Use WinLine CRM for creating and managing your company press releases. You can flexibly and easily adjust the set of customer records that will be applied for each release using the sales campaign lists.

Selected marketing functions:
+ Campaign planning and execution
+ Target group selection
+ Setting up sales campaigns
+ Sending emails, serial letters
+ Press releases

CRM IN SERVICES

It is becoming easier and easier to compare products in today's increasingly small world – a true shopper's paradise. This fact puts new emphasis on customer service activities. You need to ensure that your customer service department meets customer needs and requests as efficiently and quickly as possible.

WinLine CRM offers many kinds of features that directly support services and support departments. Help desk platforms, service progress reporting and customer order generation for your external sales force are all standard features in WinLine CRM. The module can be used to handle automated claims management including support ticket escalation and many other features. Use our CRM system to increase your customer satisfaction and customer loyalty!

Help desk and support tickets
Customer inquiries, claims, service contracts and support activities can all be created and managed in the WinLine CRM module. Workflow processes steer customer support tickets on a case-by-case basis. Each workflow defines the actions that are triggered at each step in a workflow, e.g., emails to delegated users and user groups, delegation of the workflow ticket to another department, archiving of associated documents and many other possible actions. Automated notification and warning functions ensure that no support ticket is stranded in the system. The time expended on a particular support ticket can be recorded for reporting purposes to assist in calculating the incurred costs.

Selected functions
+ Customer support and online help desk
+ Ticketing system
+ Automated workflow management
+ Claims and customer complaint management
+ Follow-up and escalation management
+ Knowledge base features

CRM FOR ALL ACTIVITIES

+ Total ERP Integration

The WinLine CRM module is a valuable tool for your employees in sales, marketing and services due to the large number of features that support processing of customer and vendor data.

The WinLine CRM module shows its full range of power when used in connection with the WinLine ERP programs. The simple reason: both systems use the same common database! The CRM system thus has access to information from all ERP areas (e. g., product data, inventory levels, order backlogs, payment terms, discount terms, open items, etc.) and on the other side, the ERP system has access to all information from the CRM module, e.g., workflows, calendar dates, To-Do Lists, etc. This common set of data lets you generate powerful reports that give you a encompassing view of customer and vendor status and behavior. Exactly the information you need for systematic decision-making in your day-to-day customer and vendor-related activities.

The WinLine CRM can be used as a stand-alone solution, as well, independent of other software solutions.

+ Addresses & Customer Information

All address and contact information on customers, prospects, vendors and contact persons is available in the WinLine CRM module. Easy-to-use search functions and lists assist you all along the way when making selections. This lets you quickly filter data to locate the records that you want to process with a telephone call list, a serial letter or an email sales campaign. The customer/vendor information report summarizes all data for a record in one place: sales figures, remarks, arrangements, contracts, projects and many other kinds of data. The entire customer or vendor account history can be tracked and viewed in one central area.

+ Calendar & Appointment

Manage your contact persons and events wherever you like: in WinLine CRM, in Microsoft Outlook, or synchronized through the MS Exchange server. The WinLine calendar shows you all events for individual users or user groups. You can filter the calendar display based on your authorization level, and select just your own events, or those of your coworkers, or all company events. In addition you can set up reminders, follow-ups and escalation status for any kind of event.

+ Workflows

Use workflows to steer business processes in your company. Delegation rights, follow-up steps, status emails and many other features let you automate and streamline your company processes. Using workflows, you can set up processes for customer claims, support tickets, requisition orders, employee vacation requests, seminar orders, guarantee orders, and many other kinds of actions.

+ Office Integration

Process and work with your WinLine data in one of your MS Office applications. You can send sales campaign emails with MS Outlook, print serial letters with MS Word and output reports directly to MS Excel pivot tables.

+ Cloud Integration

Save and maintain documents, reports, lists from WinLine CRM in the cloud and give your employees access to the information.

+ Social Collaboration - WinLine SHARE

WinLine SHARE is a communication and chat platform that is integrated with the WinLine CRM module. It offers a number of advantages: stop the daily flood of emails, documented discussion threads, centralized information storage, optimal worker efficiency, group chat forums, like/don't like evaluations. Use WinLine SHARE to set up a quick, uncomplicated and easy-to-use company interaction platform to network information and ideas, and to promote the generation of social communities.

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