



**piaX CRM**

*Close more deals in less time*

Sell smarter with the fully in Microsoft Outlook embedded tool piaX CRM. piaX CRM puts your customer information at your fingertips, any time and everywhere. Increase your market insights and sales opportunities by capturing past interaction or relevant information in the client history.

At the same time piaX CRM makes your contact management more efficient and paperless. View and edit customer data at each interaction, even without internet connection.

This way you increase transparency in sales and customer satisfaction. Contrary to conventional CRM systems, piaX works with the database of your ERP system. Thus, data quality in your ERP system will improve significantly, while avoiding the need to manage several databases.



Works entirely offline



Embedded in MS Outlook



Bidirectional interface to proALPHA as standard

### Your advantages with piaX CRM:

- Gain insights on your customers and sales opportunities thanks to flexible boards
- Sell smarter through increased market insight
- Optimize sales engagement by planning sales activities
- Increase revenue by prioritizing the right opportunities for each prospect
- Use one central database for your ERP system, MS Outlook and mobile devices
- Work when and wherever you want even without connectivity

## *piaX CRM offers you:*



### *Manage leads and contacts*

- Record key information about leads and costumers
- Increase data quality by storing customer information in a central database
- Segment contacts based on industry, geography or other attributes



### *Capture every opportunity*

- More overview of customers, open quotes, invoices or revenue
- Quickly identify and categorize leads
- View sales opportunities with detailed information like state, products involved, quotes and activities



### *Optimize your sales processes*

- Extensive search and segmentation functions
- Attach reports and documents
- Track customer emails and manage appointments directly in MS Outlook using reminders



### *Work on the road*

- Access to costumers information every time and everywhere
- Work offline and without VPN connection





Kontakt 200000 / Kunde 100000

StromMax e.G. Energy Care / Prospect - 200000 / Customer - 100000 / Sales Documents  
Raiffeisenstraße 50, 55124 Mainz, Deutschland

Document date	Document Type	Document Number	Purchase Order	Specialist	Total Net	Total gross	Currency	Open																																																															
5/5/2003	Shipping Document	10303122		Harald Bauer	21,117.84 EUR	24,496.69 EUR	EUR	<input type="checkbox"/>																																																															
4/7/2003	Sales Order	10203083		Harald Bauer	20,607.92 EUR	23,905.19 EUR	EUR	<input type="checkbox"/>																																																															
4/7/2003	Invoice	10403089		Harald Bauer	28,378.40 EUR	32,918.94 EUR	EUR	<input type="checkbox"/>																																																															
4/7/2003	Invoice	10403088		Harald Bauer	20,607.92 EUR	23,905.19 EUR	EUR	<input type="checkbox"/>																																																															
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3/6/2003	Invoice	10403062		Harald Bauer	46,806.64 EUR	54,295.70 EUR	EUR	<input type="checkbox"/>																																																															
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3/5/2003	Sales Order	10203058		Harald Bauer	46,806.64 EUR	54,295.70 EUR	EUR	<input type="checkbox"/>																																																															
<table border="1"> <thead> <tr> <th>Line</th> <th>Part</th> <th>Description</th> <th>Unit Price</th> <th>Quantity</th> <th>% D/S</th> <th>Final Price</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1300010</td> <td>CEE Kupplung 5x16A, 6h</td> <td></td> <td>141.55</td> <td>42.00</td> <td>0.00</td> </tr> <tr> <td>2</td> <td>1300020</td> <td>CEE Kupplung 5x32A, 6h</td> <td></td> <td>151.05</td> <td>32.00</td> <td>-5.00</td> </tr> <tr> <td>3</td> <td>1300110</td> <td>CEE Wanddose 5x16A, 6h</td> <td></td> <td>151.05</td> <td>67.00</td> <td>0.00</td> </tr> <tr> <td>4</td> <td>1300120</td> <td>CEE Wanddose 5x32A, 6h</td> <td></td> <td>160.55</td> <td>37.00</td> <td>0.00</td> </tr> <tr> <td>5</td> <td>1300210</td> <td>CEE Stecker 5x16A, 6h</td> <td></td> <td>103.55</td> <td>49.00</td> <td>-5.00</td> </tr> <tr> <td>6</td> <td>1300220</td> <td>CEE Stecker 5x32A, 6h</td> <td></td> <td>113.05</td> <td>52.00</td> <td>-5.00</td> </tr> <tr> <td>7</td> <td>2500000</td> <td>Socketgehäuse mit Längsver-</td> <td></td> <td>11.40</td> <td>390.00</td> <td>0.00</td> </tr> <tr> <td>8</td> <td>2500001</td> <td>Socketgehäuse mit Längsver-</td> <td></td> <td>11.40</td> <td>470.00</td> <td>0.00</td> </tr> </tbody> </table>									Line	Part	Description	Unit Price	Quantity	% D/S	Final Price	1	1300010	CEE Kupplung 5x16A, 6h		141.55	42.00	0.00	2	1300020	CEE Kupplung 5x32A, 6h		151.05	32.00	-5.00	3	1300110	CEE Wanddose 5x16A, 6h		151.05	67.00	0.00	4	1300120	CEE Wanddose 5x32A, 6h		160.55	37.00	0.00	5	1300210	CEE Stecker 5x16A, 6h		103.55	49.00	-5.00	6	1300220	CEE Stecker 5x32A, 6h		113.05	52.00	-5.00	7	2500000	Socketgehäuse mit Längsver-		11.40	390.00	0.00	8	2500001	Socketgehäuse mit Längsver-		11.40	470.00	0.00
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2/11/2003	Shipping Document	10303055		Harald Bauer	4,104.00 EUR	4,760.64 EUR	EUR	<input type="checkbox"/>																																																															
2/11/2003	Shipping Document	10303032		Harald Bauer	42,604.19 EUR	49,420.06 EUR	EUR	<input type="checkbox"/>																																																															
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1/13/2003	Sales Order	10203163		Harald Bauer	150,000.00 EUR	174,000.00 EUR	EUR	<input type="checkbox"/>																																																															

## Perfect overview of your sales documents

Find all your sales documents from proALPHA, such as quotes, orders or delivery notes in piaX. This overview shows every single position with information on part, quantity and price. This way you have all the information you need while being on the road.

*„We improved the acceptance for CRM tools significantly with piaX, because we not only use piaX to collect data but offer real added value to our sales managers“*

**theben**<sup>®</sup>

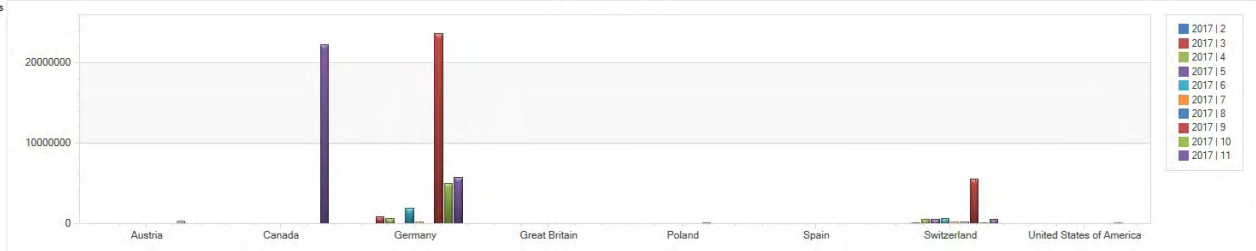


## piaX - Sales Forecasts Overview

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Sales Opportunity	Customer	Product Line	Offer Value Description 1	Total Value Weighted	SalPriStat	RFQ	Selection	Sales Opportunity Name	Close Probability	Archived	Sales Agents	City	Branch	Sales Opportunity Group Key	Decision
Specialist: [ ] Date: [ ]															
Total Value: [ ] Year: 2017 Month: [ ]															
Region	2	3	4	5	6	7	8	9	10	11	12	2017 Total		2018	
Austria									\$300,000.00		\$50,000.00	\$350,000.00			
Canada						\$67.84				\$22,321,322.00		\$22,321,389.84			
Germany	\$9,587.00	\$896,760.56	\$589,071.02	\$21,471.07	\$1,878,360.06	\$168,340.65	\$23,321.00	\$23,636,972.20	\$5,000,100.00	\$5,749,730.00	\$1,312,582.00	\$39,286,295.56			\$2,233,320.00
Great Britain		\$20,000.00										\$20,000.00			
Poland								\$81,006.12				\$81,006.12			\$555,500.00
Spain		\$4,963.94		\$5,285.40								\$10,249.34			
Switzerland		\$62,445.20	\$554,881.00	\$534,259.70	\$619,676.45	\$201,605.00	\$256,987.00	\$5,488,165.00	\$134,053.76	\$563,077.76	\$2,323,222.00	\$10,738,372.87		\$50,000.00	
United States of America									\$155,287.00			\$155,287.00			
Grand Total	\$9,587.00	\$984,169.70	\$1,143,952.02	\$561,016.17	\$2,498,036.51	\$370,013.49	\$280,308.00	\$29,206,143.32	\$5,589,440.76	\$28,634,129.76	\$3,685,804.00	\$72,962,600.73		\$50,000.00	\$2,788,820.00

Use Data Fields on x-Axis



## Create your individual sales forecast easily

piaX offers you the possibility to create your own forecasts with all quote values. Analyze your opportunities according to part group, contact or sales project. To make your forecast even more meaningful, you can use weighted quote values and display them in a bar chart.



piaX - Prospects

Default Layout. [dropdown] [plus] [minus]

Search [input]

Drag a column header here to group by that column

Prospect	Name	Industry (long)	Prospect Class	Country (long)	ZIP Code	City	Street	Last Sales Activity	Sales/Month	Sales/Year	Sales Last Year
200000	StromMax e.G. Ener...	Wholesale Trade	Customer	Deutschland	55124	Mainz	Raiffeisenstraße 50	11/2/2017	0.00	512.807.50	1.041.416.00
200001	Ronnenberger Ges. f...	Wholesale Trade	Archived	Deutschland	30952	Ronnenberg	Längenfeldstraße 11	8/3/2017	0.00	218.156.00	113.572.40
200002	Voltaplan AG Autom...	Wholesale Trade	Customer	Deutschland	80992	München	Nonnenstraße 13	2/15/2017	0.00	298.791.60	44.610.60
200003	Industrie- und Bürob...	Engineering Industry	Customer	Deutschland	66223	Saarücken	Göttelborner Straße 4	5/17/2017	0.00	298.102.60	143.981.80
200004	BFD Sport AG	Freight Forwarder, C...	Customer	Deutschland	04103	Leipzig	Aenderweg 22	10/2/2017	0.00	57.185.40	4.990.00
200005	Otten GmbH	DIY Stores	Customer	Deutschland	04103	Leipzig	Inselstraße 21	10/19/2017	0.00	115.818.00	0.00
200006	EWER GmbH	Retail Trade	Educational Facility	Deutschland	04103	Leipzig	Petersstraße 33	1/3/2017	0.00	0.00	0.00
200007	Tyrion GmbH	Engineering Service	Customer	Deutschland	04509	Krostitz	Amsehweg 8A	3/3/2017	0.00	0.00	0.00
200008	Obirah Süßwaren G...	Wholesale Trade	Prospect	Deutschland	04103	Leipzig	Riegelstraße 34A	6/12/2017	0.00	0.00	0.00
200009	Enoph GmbH	Service Provider (Ref...	Customer	Deutschland	04111	Leipzig	Salomonstr. 41	8/16/2017	0.00	555.786.20	25.548.80
200010	Leipziger Bananenpl...	Wholesale Trade	Customer	Deutschland	04103	Leipzig	Salomonstraße - 33...	3/3/2017	0.00	0.00	0.00
200011	Happy New Year Gm...	DIY Stores	Prospect	Deutschland	04103	Leipzig	Bergstraße 1	7/11/2017	0.00	0.00	0.00
200012	Extra GmbH	Mechanical Engineer...	Prospect	Deutschland	04103	Leipzig	Kreuzallee 11	1/13/2017	0.00	459.382.00	0.00
200013	OG Nomekop	Wholesale Trade	Prospect	Deutschland	04106	Leipzig	Homesstreet 2	1/5/2017	0.00	0.00	83.455.00
200014	HamChem Hamburg...	DIY Stores	Prospect	Deutschland	22592	Hoheluft	Grandweg 130	7/17/2017	0.00	6.487.00	0.00
200015	HamChem Hamburg...	Service Provider (Ref...	Customer	Deutschland	22529	Hamburg		6/28/2016	0.00	193.50	0.00
200016	Tame Trade	Engineering Service	Objektverwaltung: PL...	Deutschland	28870	Verden	Willowstraße 12	10/19/2017	0.00	0.00	0.00
200017	Meereen GmbH	Wholesale Trade	Customer	Deutschland	04299	Dresden	Meerenge 10	1/18/2017	0.00	0.00	0.00
200018	Tempo AG	Wholesale Trade	Prospect	Deutschland	04229	Leipzig	Johannesstraße 66	6/14/2017	0.00	0.00	0.00
200019	Tabacoco GmbH	DIY Stores	Prospect	Deutschland	50667	Köln	Elmstreet A 21	1/5/2017	0.00	0.00	698.400.40
200020	Cherry Development	Engineering Service	Customer	Deutschland	24586	Dresden	Huntestraße 23	12/14/2016	0.00	137.974.00	122.974.00
200021	Druckerei Datenspei...	Manufacturer's Repr...	Educational Facility	Deutschland	00001	Bremen	Musikantenstadt 45	9/14/2016	0.00	99.80	0.00
200022	Minen von Moria Ltd.	Wholesale Trade	Customer	Deutschland		Nebelgebirge	Am See	5/27/2016	0.00	0.00	0.00
200023	Autohaus Heil GmbH	Retail Trade	Prospect	Deutschland	04249	Leipzig	Rehbacher Straße 27	3/29/2017	0.00	0.00	0.00
200024	Die beste Firma der...	Wholesale Trade	Prospect	Deutschland	85744	Lübeck	Deichstraße 1	12/19/2016	0.00	0.00	0.00
200025	Weihnachtsmann G...	Wholesale Trade	Prospect	Antarktis	AAAAA	Nordpol	Hinter den Pinquine...	3/20/2017	0.00	0.00	0.00
200026	HighTech Antriebste...	DIY Stores	Prospect	Great Britain	10585	London	Krumme Straße 75	7/14/2017	0.00	0.00	0.00
200027	HighTech Antriebste...	DIY Stores	Customer	Deutschland	08371	Glauchau	Boschstraße 14	12/7/2016	0.00	0.00	55.488.80
200028	BKD Delitzsch GmbH	DIY Stores	Prospect	Osterreich	04509	Wien	Fabrikstraße 2	2/28/2017	0.00	0.00	0.00
200029	Nozama S.a.r.l.	Retail Trade	Prospect	Luxemburg	2338	Luxemburg	Rue Plaetis 5	10/24/2017	0.00	66.367.00	0.00
200030	Sunfilm AG	Retail Trade	Supplier	Deutschland	01900	Großröhrsdorf	Sunfilmstraße 8	6/22/2017	0.00	0.00	0.00
200031	Idua GmbH	Wholesale Trade	Prospect	Deutschland	04229	Leipzig	Autostraße 2	12/21/2016	0.00	0.00	0.00
200032	Wmb GmbH	Wholesale Trade	Prospect	Deutschland	04179	Leipzig	Hauptstraße 22	8/22/2017	0.00	0.00	0.00
200033	Pumpspeicherwerk...	Wholesale Trade	Customer	Deutschland	15269	Markersbach	Markersweg 23	8/23/2017	0.00	0.00	0.00

**Flexible lists for easy customer management**

You need special information or overviews? With piaX you have an unlimited amount of possibilities to categorize, search and select your contacts. You can even create rules to highlight certain contacts, such as contacts you lost touch with in the past months. This way you never lose an opportunity.



Prospect

Close Save Add Contact Add Sales Opportunity Add Delete Contact Delete Sales Opportunity Delete Sales Activity Prospect Sales Activities Assign Status Delete Status Add Attendee Delete Attendee Assign Sales Agent Send e-mail Local Info Print Common Add Add Add Delete Workflow Status Assignments Attendees Communication Filing Print

**StromMax e.G. Energy Care / Prospect - 200000 / Customer - 100000 / Sales Activities**  
Raiffeisenstraße 50, 55124 Mainz, Deutschland

**Sales Opportunities**

Sales O...	Selection	RFQ	SalPrjGr...	SalPrjStat	Close P...	Specialist	Decision	Archived
1	Telesales	Allge...	Telesales	-	85	Walser	9/28/2...	<input type="checkbox"/>
3	Projekt...	BR-20...	Office...	C	70	Gleissen		<input type="checkbox"/>
5	Projekt...		Field S...	A	90			<input type="checkbox"/>
6	Projekt...		Field S...	B	30			<input type="checkbox"/>
7	Projekt...	BR-20...	Field S...	A	30	Gleissen	10/31/...	<input type="checkbox"/>
8	Projekt...		Field S...	C	30	Bauer	8/31/2...	<input type="checkbox"/>
9	Projekt...	BA-02...	Field S...	A	70	Acker...	7/4/20...	<input type="checkbox"/>
50	Hausm...		Field S...	-	100	Gleissen	9/28/2...	<input checked="" type="checkbox"/>
51	Hausm...		Office...	-	70	Zander	11/19/...	<input checked="" type="checkbox"/>
100	Handel...	SM/H...	Field S...	B	70	Zander	8/6/20...	<input type="checkbox"/>
101	Thermo	Neues...	Field S...	B	70	Billstein		<input type="checkbox"/>
102	Projekt	Lagerm...	Field S...	A	70	Zander	11/30/...	<input type="checkbox"/>
103	Konzer...	Projekt	Field S...	A	70	Zander		<input type="checkbox"/>
108	Lagerh...	Neuba...	Field S...	A	70	Eberl	4/14/2...	<input type="checkbox"/>
110	Projekt...	Lager...	Field S...	A	90	Sedlm...		<input type="checkbox"/>
111	dasdsa		A		100	Billstein		<input type="checkbox"/>
112	Test	Test 123	Field S...	B	30	Trautm...		<input type="checkbox"/>

**Sales Activity Detail**

Contact: Frau Marion Brand Date/Time: 24.10.2017 11:13

Subject: Your enquiry

Activity Type: Correspondence ActivityPeriod hrs: 0.00

Result Type:

Specialist: Jürgen Ackermann

Marketing Activity:

Urgent:  Done

To Do: Address

Subject To Do:

To Do specialist: To Do Date/Time

Remark: Attendees (2)

Dear Mrs Brand,  
Thank you for your enquiry of 26 April 2017.  
As requested, we are sending you our current illustrated colour catalogue and an export price list by separate post.  
We hope our offer is to your liking and look forward to doing business with you in the near future.  
Best regards,  
Jürgen Ackermann

**Sales Activities**

Date/Time	Subject	Contact	Activity Type	Specialist	Activity num...
2/13/2016	Routinebesuch	Herr-Dr.Marti...	Visit	Sedlmayr	3
2/15/2016	StromMax e...	Herr-Dr.Marti...	Visit	Sedlmayr	2
2/5/2016	Serviceauftrag	Herr-Dr.Marti...	E-mail	Sedlmayr	2
2/5/2016	Serviceauftrag	Herr-Dr.Marti...	E-mail	Sedlmayr	4
9/2/2016	Referenster...	Frau Marion...	Visit	Trautmann	5
8/30/2016	Kalendereintr...	Frau Marion...	Reference Visit	Trautmann	6
6/8/2016	E-Mail für die...	Frau Marion...	E-mail	Trautmann	2
9/26/2016	Abprache-Pr...	Herr-Dr.Marti...	Telephone-Call	Bauer	8
1/6/2017	WG-Wichtige...	Herr-Prof.-Dr...	E-mail	Trautmann	9
5/9/2017	Kundenbesuch	Herr Dr. Marti...	Visit	Trautmann	10
9/27/2017	Meeting	Herr Dr. Marti...	Presentation	Trautmann	11
10/24/2017	Your enquiry	Frau Marion...	Corresponde...	Ackermann	-1

## Capture all customer interaction at the corresponding sales project

What did I discuss with the customer lately? Record all interaction like E-Mails, phone calls, reminders or reports in piaX at the corresponding sales project. Especially the function to put a reminder linked to your MS Outlook calendar and tasks makes sales so much easier.

## Feature Overview



### *Manage your contacts easily and everywhere*

- Transfer your contacts from MS Outlook easily to piaX
- View detailed customer information including address, contact person, representative, state or group membership
- Uncover leads and classify them to follow up to your target group
- Improve data quality by avoiding double entries
- Show customer value with an overview about open quotes, invoices or sales volume
- Segment customers by individual features like industry, geography or ABC-analysis
- Insight on service tickets or calls



### *Optimize your daily work in sales*

- Gain an overview of all sales projects including status, products, quotes and activities
- Record competitors and attach them to your sales opportunities
- Detailed information on products offered and sold to a specific customer
- Analyze and evaluate the sales history and revenue of individual customers
- Sales activities are linked to appointments and tasks in MS Outlook to keep track of your customer meetings
- Keep record of all interactions between you and your lead, like phone calls, e-mails or visits
- Overview of all sales documents e.g. quotes, orders, delivery notes or invoices



### *Document Management System for less paper mountains*

- Direct connection between piaX and your ERP's Document Management System to view or store documents, reports, quotes in one database
- Direct link of reports to sales activities and dates
- Use piaX to send and archive all your customer communication



## Feature Overview

### Create Forecasts to navigate your sales

- Link quotes to sales opportunities and keep adapting the status
- Weight quote values correspondent to probability of deal
- View reports and charts of all quotation values
- Analyze offered product quantities and prices per customer

### General features to simplify daily work

- Search data with specific criteria using filters
- Manage multiple lists with extensive functions for segmentation and store your favorite layouts
- Divide private and business contacts
- Arrange, print or export individual lists for follow-up
- Embedded in MS Outlook and your ERP-System to use reminders and workflows

### Administrative features

- Administrate synchronization and define access rights per user group
- Surface and address formats are multilingual configurable
- Multi-Tenant Capability

### System requirements

- ERP-System proALPHA
- Microsoft Outlook 32 or 64 Bit 2010/2013/2016
- Microsoft Exchange Server 2010/2013/2016/365
- Smartphones with Active-Sync Support
- Further information on our website

### Contact

Request further information from your proALPHA-partner, on the internet on [www.pia-x.com](http://www.pia-x.com) or directly at

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PRO ALPHA®

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Silver Application Development

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