

piaX object management

The CRM for contract business and construction industry

The contract business is often of great dynamism and complexity characterized: contacts, decision-making authority or the object planning themselves change frequently.

With the piaX object management you keep the overview here. All relationships can be easily recorded and when needed be adjusted. The object always remains in focus.

All construction projects and object data can be directly in proALPHA or MS Outlook managed and evaluated. So that supports piaX Property Management Your sales force when uncovering and tracking new opportunities.



- Fully integrated in proALPHA as additional module
- Mobile and offline available as MS Outlook add-in

The piaX object management was developed in cooperation with:

theben[®]

WALDNER

Schweizer

Your advantages with the piaX object management:

- More transparency in networked projects and relationships
- View relationships, sales documents, or activities from an object perspective
- Shorter response times through quick access to core data
- More overview through the hierarchical representation of objects and projects
- Understand which people worked on which projects in which function
- Systematic tracking of tenders and offers

PIA-X[®]

mobileBLOX[®]
Softwareentwicklung und Beratung

This is what piaX Object Management offers you



360° view of objects

- Capture of all object data
- Assignment of relationships to the object
- Mapping object hierarchies
- object classification
- Individual characteristics



Efficient editing of objects

- Simplified tracking of offers
- Recording projects to objects
- Creation of forecasts
- Overview of all activities



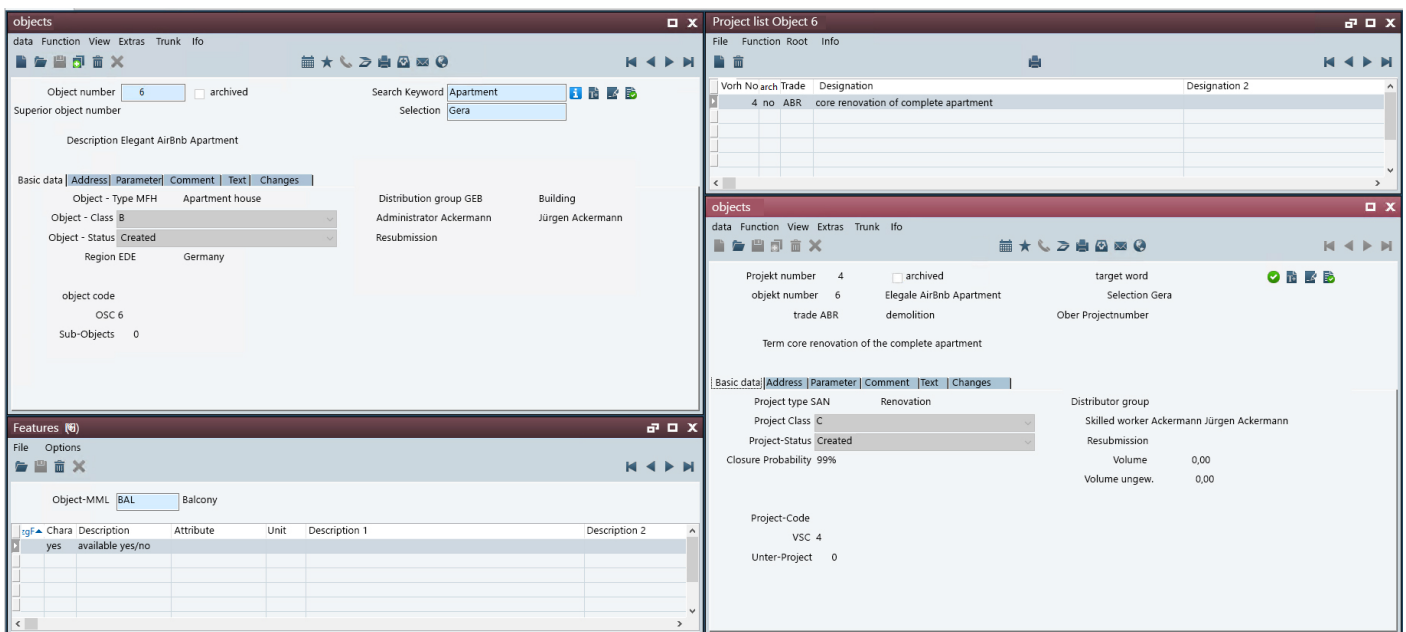
Depicting relationship networks

- Create object-specific roles
- Overview of all relationships beyond the project term
- Viewing relationships from different perspectives



Work directly in proALPHA and MS Outlook

- Complete integration into proALPHA and MS Outlook incl. Document management
 - Link to sales documents and service
- Extensive search and filter function
- Mobile access to object data, even offline



Efficiently process objects via projects

In our object management module especially for proALPHA you can map and classify your objects with all relevant information. For an even more efficient way of working, assign different projects to your objects, which can be Tenders. With the appropriate dates, characteristics, trades, probability of completion and so on, you are well informed with which orders you can expect in the near future.



contacts

data Function View Extras Trunk Ifo

Contact/Customer 200000 100000

names StromMax e.G.

road Raiffeisenstraße 5

place DE 55124 Mainz

target word StromMax

Selection Mainz

specialist Geissen

Telefon +49/6131/9721-0

Telefax +49/6131/9721-99

Basic data | Parameter | Bank details | Comment | Free fields

Distributor group

Branch ED Engineering Services

Region EDE Germany

Industry Contact 51000 Trade Directory Wholesale

Contact class K Customer

including tax number

Language German

Currency 0 EUR

Price list DEG Germany Grol

Discount group

☐ Discount visible

☐ Freight discount possible

Project list contact 200000 (customer 100000)

data Function trunk Ifo

☒ valid

Proj Nu	Description Role	Rolls Class	roll	from	till	Assignment Architect	Assig
1	architect	+	ARCH	15.10.2018	05.12.2018	no	
3	department	-	BEH	15.10.2018	22.01.2019	no	
4	site supervision	+	BL	15.10.2018		no	

Assignment of participants to project 1

data Function Extras trunk

☒ valid

igF	Role	Description Role	Customer	Contact name	name
1	architect	architect	150000	250000 Gustav Birkli AG	
1	architect	architect	100000	200000 StromMax e.G.	

Contact 250000 Gustav Birkli AG

contact number 0

clerks

role class 0

Designation Architects

roll architect architect

valid from 14.09.2018

valid until

Display sequence 1

☐ archived

Transparent representation of complex relationships

With the piaX property management you can see which project involved a person in which role. Furthermore, with just a few clicks, you can find out which projects exist for a contact and who, for example, is the contact person there.

In the role list for the object, you can quickly see which participants are already known to you and which participants are still missing. This will allow you to prepare well for meetings and negotiations.



contacts

data Function View Extras Trunk Ifo

object number ☐ archived

Superior object number

Description Apartment

Search term Selection

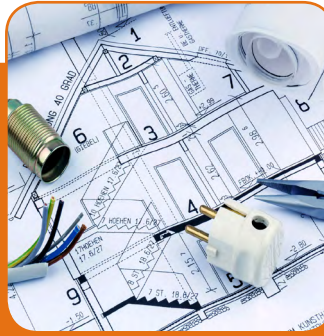
Basic data | address | Parameter | Comment | Text | Changes

Object type Ah	Apartment house	Distributor group GEB	building
object class: B		specialist Ackermann	Jürgen Ackermann
Object status created		resubmission	
Region EDE	Germany		
object code			
OSC 6			
Sub-Objects 0			

➤ Property management directly in proALPHA

The big advantage of piaX object management is the complete integration into proALPHA as Additional module. You can assign your agents, regions, sales projects etc. directly to an object. From sales to billing, all work with the same current data.

Especially for the service sector, the piaX object management offers a huge advantage. By assigning serial numbers and service objects to an object or subobject, you can see where your products are and can even adjust this assignment if the location changes.



2000011 /

Object / Tender

Object: / 200001
office block Salomonstraße 22a, Salomonstraße 32, 04103 Leipzig

Activities

Sales Documents

Objects

Object number Description

2000001

2000003

Object details

Description

Description

Address office block Salomonstraße 22a, Salomonstraße 32, 04103 Leipzig Edit Address

Object number 200.001 archived Search Term Bürohaus

Region Germany Selection Leipzig

Object state aktive Work Group Gebäude

Object class A Specialist Jürgen Ackermann

Object Type Residential building - multiple dwelling - free-standing ToDo

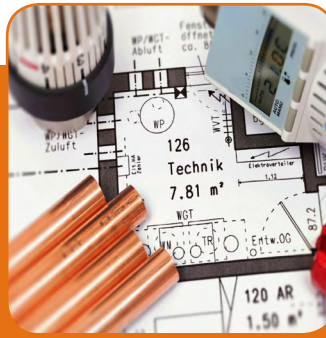
Participants Activities Remark Text Block Features Conditions

Tender number	Description	Display Sequence	Name	Role	Role class	Telephone	Cell Phone	E-Mail	Valid from	Valid until	archived	
30000001		2				0			12/29/2016		<input type="checkbox"/>	<input checked="" type="checkbox"/>
30000002		15	10tacles Studios AG		1	+49 6402 1243 - 0		info@10tacles.com	10/4/2018		<input type="checkbox"/>	<input checked="" type="checkbox"/>
30000003		9999	Teamwork Baumärk...		0	+49/511/789698-0		info@teamwork-ag...	7/10/2017		<input type="checkbox"/>	<input checked="" type="checkbox"/>
30000123		9999	Hubert Billstein		0	06636/200-18		billstein@proelectr...	7/10/2017		<input type="checkbox"/>	<input checked="" type="checkbox"/>
30000136		9999			0				6/22/2017		<input type="checkbox"/>	<input checked="" type="checkbox"/>
30000124		9999			0				12/22/2016		<input type="checkbox"/>	<input checked="" type="checkbox"/>
30000125											<input type="checkbox"/>	<input checked="" type="checkbox"/>

➔ piaX object management directly in MS Outlook

With the mobile version of the object management, you always have access to your current processes, contact persons, customers or information about the object. Capture new data easily and intuitively in the familiar MS Outlook interface, where you can manage your e-mails, tasks and appointments at the same time.

The functions at a glance



360° view of objects

- Capture of object data, such as address, name and status
- Assignment of participants to the object (client, architect, responsible employees)
- Mapping of object hierarchies by subdivision into sub and top objects
- Options for classification and segmentation by region, type, class and freely definable feature
- Flexible assignment options
- Preconfigured object information sheet for quick overview of the core data
- Extensive analysis and evaluation options



Efficient processing of objects via projects

- Systematic tracking of tenders
- Recording of projects with deadlines, tender number, trade, status and other relevant information
- Classification of projects by class, type, probability of completion and freely definable characteristics
- Mapping of project hierarchies by subdivision into sub-projects for different trades
- Preconfigured project information sheet
- Creation of forecasts with requested products, probabilities and offer values



Capture all activities in the contract business

- Set activities such as phone calls or visits to resubmission
- Assignment of several participants to one activity
- Multiple assignment of an activity e.g. to an object, project and contact
- Recording of visit reports
- Planning and editing activities



The functions at a glance



Depicting relationship networks

- Create object-specific roles
- Definition of role lists depending on the object type for quick overview of the contact persons
- Presentation of the activity history
- Overview of all relationships beyond project duration
- Viewing relationships from different directions, e.g. „On which projects does this person work in which function?“ Or „Who was involved in this project?“
- Link prospects, contacts, and agents to multi-layer relationships



Work directly in proALPHA and MS Outlook

- Complete integration into proALPHA and MS Outlook (linking, e.g. to sales opportunities, customers, service module, project management module)
- Bidirectional interface for working with a database
- Mobile access to object data
- Document management for the storage of object-relevant documents
- Integration of workflows, resubmissions and feature bars
- Extensive search and filter function
- Customizable views and layouts
- Defining authorizations down to field level



Supported proALPHA versions

- From proALPHA 5.2d, 6.1e, 6.2d
- Further details on request

PRO[®]ALPHA

Contact

For more information, contact your proALPHA partner, on the Internet at www.piax.com or directly at:



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