piaX CRM Basic Features and Modules
piaX for proALPHA 3.1-Functions

Prospect and Customer Management

ADDRESS MANAGEMENT

Address Information

- Address, contacts
- Details (industry, region, work group, association, belongs to, ...)

Record Prospect Details

- Using the Outlook features (e. g. collection of data from an E-Mail-Signature) and afterwards adopting them into piaX without double entry

Address Import

- Using the Outlook features, business card reader to record addresses and contacts, and easy adoption into piaX

Search Prospects

- Broad search, sort, group and filter functions

Consistency Check

- Check for duplicates during the synchronization
- Validate the input during data entry

Categorization

- Prospects and contacts can be categorized using the Outlook category

INFORMATION MANAGEMENT

Prospect Contact History

- Sales opportunities and sales activities with filter and sort functions

Enhanced Prospect Information

- Prospect information like revenue, document details and customer information
- Information from proALPHA project management and Service module
- Supports "free fields"

Sales Opportunities

- Current sales opportunities status
- Broad sort, group and filter functions

Sales Activities

- Broad sort, group and filter functions

Parts Information

- comprehensive evaluation options for quantities / prices of parts per customer according to parts or parts group

List of Features

- Clearly arranged and simple prospect and contact person handling features for better characterization
- Overview about all Features

Functions

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CRM Basic Features and Modules

Tasks And ToDo's

- Direct link to sales action (actual tasks and "to-do's")
- Forwarding tasks (open activities) via E-Mail
- Task management

Calendar

- Current appointments
- Direct link to sales actions

Overview

- Overview list of all prospects, contacts, sales opportunities, sales actions, features and sales documents
- broad search, sort and filter functions

Workflow

- Create proALPHA Workflow activities via EMail and activity monitor; to communicate with the back office

ACCESS MANAGEMENT

User sensitive

- Individual configuration and definition for business contacts for each piaX-User
- Full flexibility for filtering
- Separation between business and private contacts

Multi-Tenant Capability

Sales Management
QUOTE AND ORDER MANAGEMENT

Quote Status, Documents

- Individual configuration
- Reminder for offers

Document Information

- Overview of quotes, orders, shipping documents and invoices by prospect and over all prospects
- Document information with information of parts (part, quantity, price)

SALES SUPPORT

Date and Visit Planning

- Link sales activities to Outlook date and vice versa

Tasks

- Link sales activities to Outlook tasks

Report of Visit

- Direct link between date and sales activities

Customer Value

- Overview of active quotes, open invoices, revenue, ... by prospect
- Incl. search, sort, group and filter functions

Sales Agent Assignment

Competitor Information

- Maintenance and entry of data to competitors

Functions

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Overlapping Software Functions

Search and Selection

- All piaX-views: prospects, contacts, sales opportunities, sales activities, documents, features

Rules

- Possibility of individualization

Sales Opportunity Management

- Overview of all sales activities within a sales opportunity, such as tasks, visit, meetings, notes etc.; status of a sales opportunity
- Classification and evaluation of sales opportunities

Print and List Export

- Parameterizable print of contact and sales information
- Lists can be exported for further processing, taking into account individual piaX user settings

Manage Favorites

- Favorite piaX-Lists can be managed and saved

Multi Language

- Configurable multi language interface (piaX-menu: German, English)
- International address format (pre-/postfixfields)

Synchronization Management

- E-Mail message with synchronization problems
- E-Mail message with system check
- Possibility of soft manual stop of synchronization

Input Support

- Dynamic search fields for entering data

Functions

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piaX Module – Document Management System

Document Display

- Display of documents from the proALPHA DMS
- Display according to document category
- Documents linked to prospects/customers, sales opportunities, sales activities, sales documents, projects and calls
- Display and search through keywords
- Configuration of the synchronization according to document type, period of time and/or document size

Add documents

- Add new documents, possible when offline
- Select document type
- Automatic preselection of keywords
- Observance of data categories and size configured in proALPHA
- Storage of E-Mails (automatic preselection of prospect, contact, activity type and link to a new sales activity)
- Send and store E-Mails directly out of a sales activity

piaX Module – Forecast

Quote Values

- Display weighted and not weighted quote values
  per contact
- Edit or add quote values per sales project on basis
  auf part groups
- Weighting according to the probability of transaction of the sales project

Linked quotes

- Display of linked quotes
- Change status of linked quotes

Sales forecast

- Display of all quote values per sales project by prospect
- Overview and graphical analysis of all weighted and not weighted quote values by all prospects per part group/ prospect/ sales project