



piaX CRM

Get your sales moving with piaX

With piaX - CRM (Customer Relationship Management) you always keep an eye on your customers and prospects. Increase your market knowledge and thus your sales opportunities by collecting detailed information about the customer.

With piaX - CRM you make your contact management more efficient and paperless. You store all actions with the customer directly in the piaX at the respective customer and thus access this information at any time, even without internet access.

The positive side effect: more transparency in sales and higher customer satisfaction. In contrast to conventional CRM systems, piaX works with the database of your ERP system. This automatically improves the quality of customer data in ERP and there is no double data storage.



Can be used completely offline



Directly in MS Outlook



Standard bi-directional
interface to proALPHA

Your advantages with piaX-CRM:

- 360° view of your customers and sales projects thanks to flexible views
- More sales opportunities through greater market knowledge
- Work mobile and offline
- Uniform customer data in ERP, MS Outlook and mobile devices
- More transparency in contact data through analysis tools

piaX CRM offers you:



Manage customers and contacts

- Show detailed customer information
- Higher data quality by avoiding double entry
- Customer classification based on individual characteristics such as industry, region, ABC analysis etc.



Use sales opportunities

- More overview of customers, their current offers, open invoices or sales volume
- Detect, record and evaluate leads in order to act in a targeted manner
- View sales projects including status, products, offers and activities.



Optimize sales processes

- Extensive search and filter functions
- Include contact reports and documents
- Link to MS Outlook calendar and tasks as well as resubmission function



Mobile work

- Access to customer information anytime, anywhere
- Work offline without a VPN connection

*„Since we don't just use piaX to collect data,
but can offer the sales employee real added value,
we have significantly increased the CRM acceptance in our sales.“*

theben[®]

Clear presentation of your receipts



Prospect

Close

Save

Add Contact

Add Sales Opportunity

Add Sales Activity

Add participants

Non involvement

Non Call

Non Cell Handing

Call Position

Deletes

Workflow

Status Assignments

Attendees

Assign Sales Agent

Send e-mail

Communication

File

Print

Info

Print

Prospect

Sales Activities

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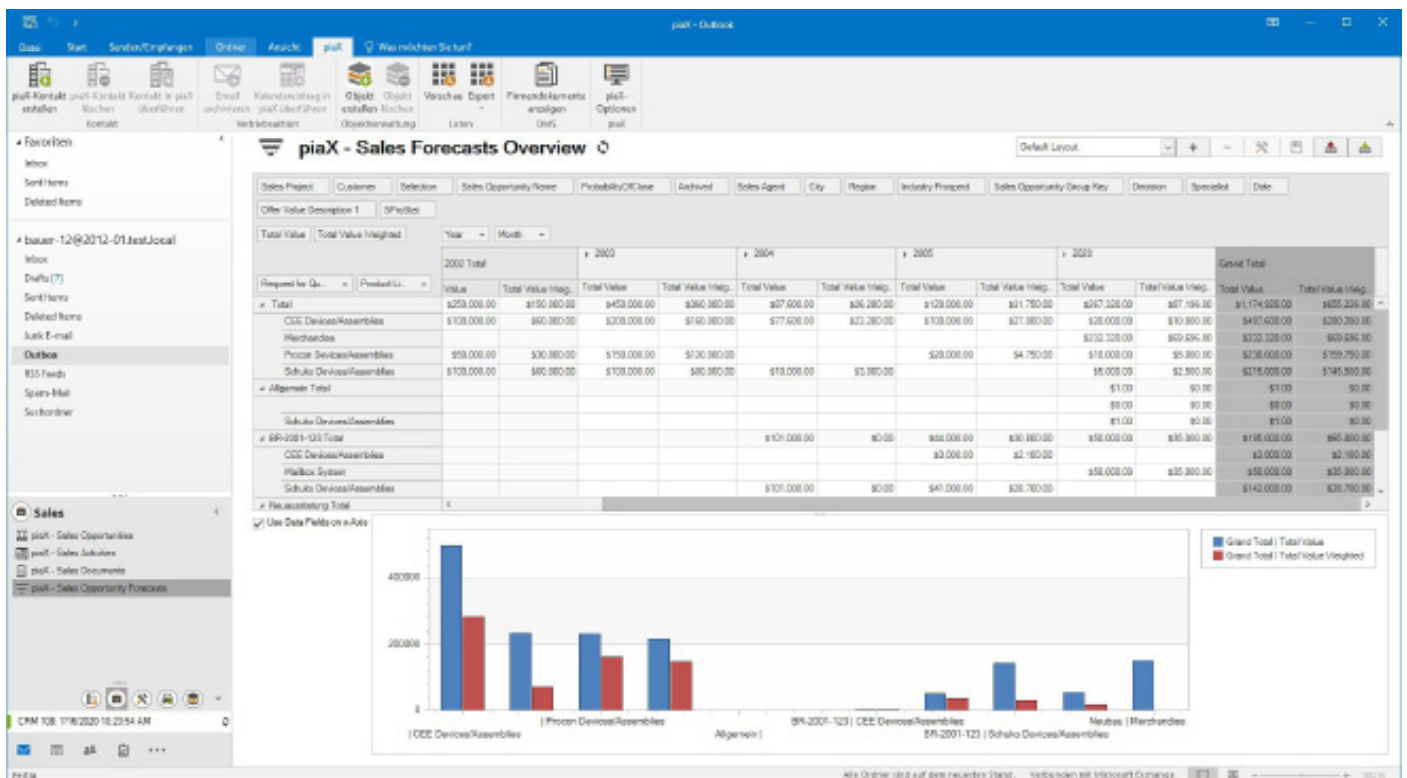
Sales Activities

Prospect

Clear presentation of your receipts

Clearly map all customer receipts from the ERP system, such as offers, orders or delivery notes, in the receipt overview. The overview contains the individual items with information on the part, quantity and price. Therefore, you always have your open offers in view.

Easily create sales forecasts



Easily create sales forecasts

In the „Sales Forecasts“ area, you can see all the offer values for your contacts. Display one view per parts group, contact or sales project and then evaluate it graphically. You create your forecast with weighted offer values, which makes it even more meaningful.

More overview thanks to flexible list views



piaX - Kontakte

Automatically Saved Layout

Drag a column header here to group by that column

Country/Region	ZIP Code	City	Street	Sales/Month	Sales/Year	Sales Last Year	Last Sales Activity	Best Sales Agent	Today's Forecast	Lead Score	Lead Source	Lead Status
Germany	80802	Munich	Quindlenstrasse 1	0.00	68,870.00	188,900.00	6/26/2019	Gleason, Jurgene	188,900.00	Good	Good	Good
Germany	04345	Leipzig	Langerstrasse 5	0.00	05,758.35	11/1/2019	Hansen, Oliver	Industrie - Industrie	0070	Good	Good	Good
Germany	66115	Saarlouis	Guttenstrasse 8	0.00	68,367.00	6/26/2019	Kraus, Michael	Good	Good	Good	Good	Good
Germany	04435	Leipzig	Wittenstrasse 3	0.00	51,555.00	3/6/2020	Holst, Wolfgang	Good	Good	Good	Good	Good
Germany	65434	Wiesbaden	Flussstrasse 6	0.00	68,000.00	2/6/2021	Gleason, Jurgene	Good	Good	Good	Good	Good
Germany	30805	Hannover	Neue Landstrasse 1	0.00	43,885.95		Holst, Wolfgang	Good	Good	Good	Good	Good
Germany	9321	Munich	Industriestraße 1	0.00	11,070.00		Gleason, Jurgene	Good	Good	Good	Good	Good
Germany	67685	Münster	Pöden-Strasse 11	0.00	8,652.00		Kraus, Michael	Good	Good	Good	Good	Good
Germany	64729	Leipzig	Erbenstrasse 1	0.00	34,451.00	4,491.00	5/20/20	Holst, Wolfgang				
Germany	60219	Frankfurt	Mundelstrasse 1	0.00	0.00							
Germany	94292	Trier	Wendstrasse 89	0.00	0.00							
Germany	40832	Witten	Luisenstraße 7	0.00	0.00							
Germany	49470	Wittmund	Deichstrasse 22	0.00	0.00							
Germany	62110	Gießen	Wahlstrasse 50	0.00	0.00							
Germany	64331	Münster	Johannstrasse 1	0.00	0.00							
Germany	40764	Langenfeld	Hausstrasse 11	0.00	0.00							
Germany	17933	Rostock	Berliner Strasse 143	0.00	0.00							
Germany	70467	Karlsruhe	Akt. Str. 40	0.00	0.00							
Germany	25723	Emden	Unterstrasse 12	0.00	0.00							
Germany	62113	Saarlouis	Industriestraße 31	0.00	0.00							
USA	78102003	Houston	201 Trichter Square	0.00	0.00			Gleason, Jurgene				
Hungary	4024	Dabas	Widokiraly u. 25	0.00	0.00			Roman, Alexander				
France	94835	Nancy		0.00	0.00			Kraus, Michael				
Austria	8071	Graz	Schneidgasse 32	0.00	0.00			Gleason, Jurgene				
Germany	67685	Münster	Industriestraße 1	0.00	0.00			Kraus, Michael				
Germany	67685	Münster	Auf dem Insel 8	0.00	0.00			Kraus, Michael				
Germany	67685	Münster	Wahlstrasse 1	0.00	0.00			Kraus, Michael				
Canada	62820	Toronto	500 Spadina Ave	0.00	0.00			Kraus, Michael				
USA	15235	Pittsburgh	899 Main Road	0.00	0.00			Kraus, Michael				

CRM 108 17/06/2020 10:59:20 AM



More overview thanks to flexible list views

The piaX lists allow you to flexibly group or filter your contacts according to various criteria. You define various rules, which highlight your contacts in colour. This gives you a quick overview of your customers.

Sales projects with all customer interaction



The screenshot displays the piaX software interface for a sales project. The main window is titled 'StromMax e.G. / Prospect - 200000 / Customer - 100000 / Sales Activities'. It features a sidebar with navigation icons for Dashboard, Prospect, Customer Information, Contacts, Sales Opportunities, Sales Activities, Sales Documents, Projects, Calc, and Serial Numbers.

The central area is divided into two main sections: 'Sales Opportunities' and 'Sales Activity Detail'.

Sales Opportunities Table:

Sales Project	Selection	Request for Quote	SPOGroup	SPOStat	Specialist	Archived
1	Allgemein	Allgemein	Field Service / Sales	None	Widmer	✓
2	Projekt StromMax	BB-2001-123	Field Service / Sales	Class	Ackermann	✓
3	Projekt OB		Field Service / Sales	Class		✓
4	Projekt Bauhaus		Field Service / Sales	Class		✓
5	Projekt StromMax	BB-2001-123	Field Service / Sales	Class	Black	✓
6	Projekt Procon		Field Service / Sales	Class	Bauer	
7	Haumessce11V07		Field Service / Sales	None	Gleissner	
8	Haumessce11V07		Field Service / Sales	None	Zander	✓
9	Haumessce11V07	GM/WM 801	Field Service / Sales	Class	Zander	
10	Testbau		Service	Class		
11	Kundenrat	WW-8012-513	Field Service / Sales	Class	Gleissner	
12	Anfrage	SW		Class	Bauer	
13	Email	Kommunikation	Field Service / Sales	Class	Gleissner	
14	Anfrage	Beschulung	Office-Based Person...	None	Ackermann	

Sales Activity Detail:

Contact: Herr Martin Henes
 Datum/Uhrzeit: 1/12/2019 9:00 AM Act/Dur (Hours): 8:30
 Subject: Haumessce pro ELECTRO AG 11V07
 Activity Type: E-Mail
 Result Type: Trade Fair Visit
 Specialist: Emil Zander
 Marketing Activity: Einladung Haumessce 10V2
 Urgent: ☒ Completed: ☐
 Tags: Q1, Version 1, D60V2, Item...
 To Do: Request confirmation visit
 Subject To Do: Request confirmation visit
 Specialist To Do: Jürgen Gleissner
 Remark: ☒ Attendees (2)
 Mr. Martin Henes:
 We cordially invite you to our party on August 6, 2020 in Völkelsbach.
 We are looking forward to your coming.

Sales projects with all customer interaction

Use piaX to create sales projects for your sales opportunities. Then assign several sales campaigns or activities, such as e-mails, phone calls, visits, reports and much more, to these sales projects. The resubmission function is particularly practical, thanks to which you no longer lose sight of a project.

Travel expenses recording - *intuitive and transparent*

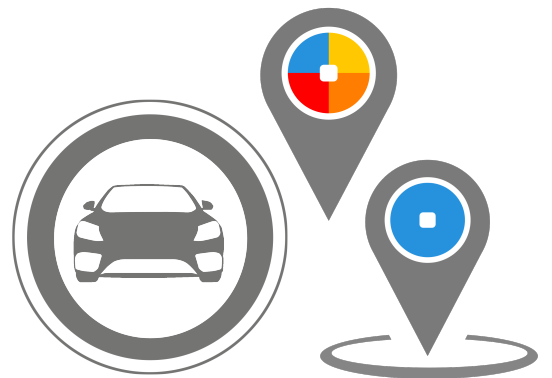
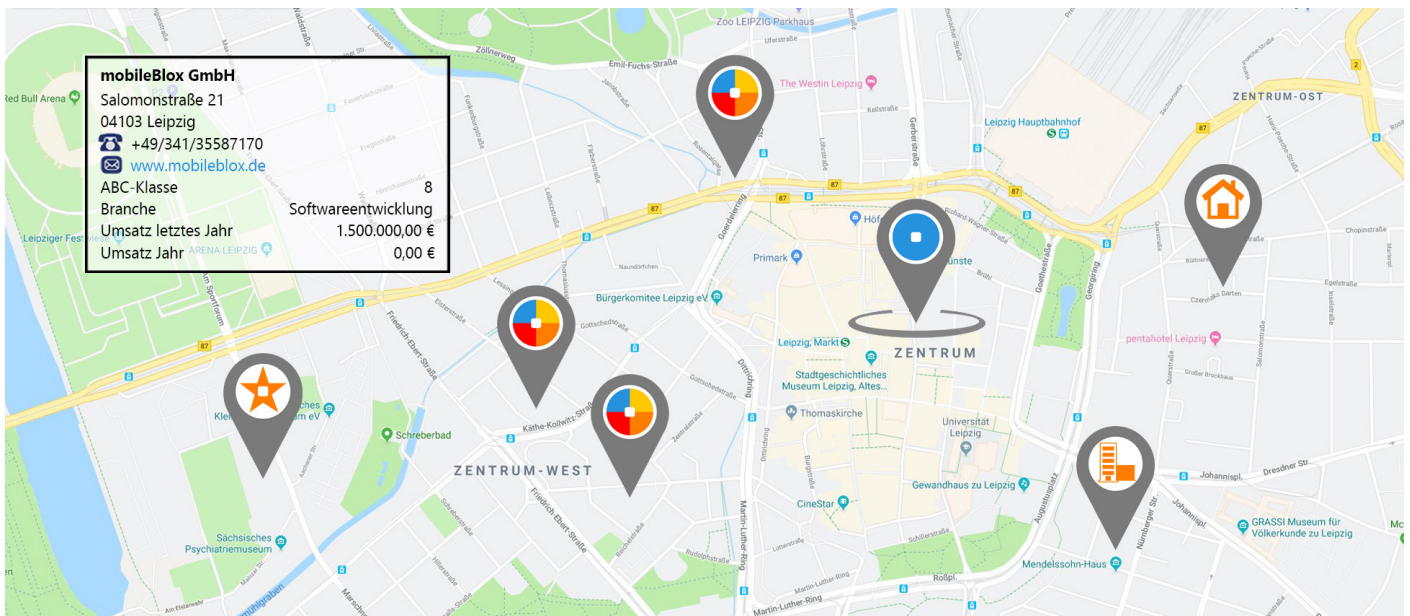


The screenshot displays the piaX software interface integrated with MS Outlook. The main window shows a calendar view for July 2020. A 'Travel Charges' window is open, displaying details for a travel expense on 7/27/2019. A 'Costs' table is visible, showing a cost of 4.00 EUR for 'Rent'. A 'Travel Charges - 7/27/2019' window is also open, showing details for a travel expense on 7/27/2019. A 'Costs' table is visible, showing a cost of 4.00 EUR for 'Rent'.

Travel expenses recording - intuitive and transparent

Use this additional module to record all costs or receipts directly in MS Outlook. No paper war - no unnecessary delays! piaX forwards the travel expenses directly to the corresponding controller for approval.

Route planning - *more than a simple route (in) e*



Route planning - more than a simple route (in) e

Plan your sales routes with the integrated piaX route planning. From small routes to long tours - this route planner is your reliable companion. As a business traveller, enter your address as the starting point in the linked map window and repeat this step for your destination or stopovers.

Detailed overview of all calls

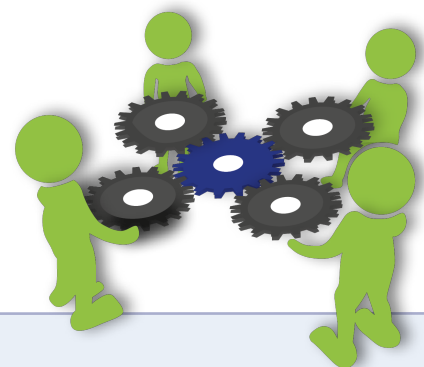


StromMax e.G. / Prospect - 200000 / Customer - 100000 / Calls
Raffelstr. 5, 55124 Mainz, Germany

Call Number	Reporting Time	Call Status	Explanation	Specialist	Open
19906290	5/14/2003 1:00 AM	In Processing	Letter dated Januar...	Harald Bauer	<input checked="" type="checkbox"/>
19906214	5/14/2003 2:00 AM	In Processing	falsche Menge gel...	Harald Bauer	<input checked="" type="checkbox"/>
19906404	7/13/2003 2:00 AM	Received	Kupplungsgehäuse...	Harald Bauer	<input type="checkbox"/>
19906412	7/13/2003 2:00 AM	Received	Gehäuse gebrochen	Harald Bauer	<input type="checkbox"/>
19906413	7/13/2003 2:00 AM	Received	Stromschlüssel re...	Harald Bauer	<input type="checkbox"/>
19906414	7/13/2003 2:00 AM	Received	falsche Menge gel...	Harald Bauer	<input type="checkbox"/>
19906473	7/13/2003 2:00 AM	Received	Reinigungs...	Harald Bauer	<input type="checkbox"/>
19906475	7/13/2003 2:00 AM	Received	Kupplungsgehäuse...	Harald Bauer	<input type="checkbox"/>
19906483	7/13/2004 2:00 AM	Received	Gehäuse gebrochen	Harald Bauer	<input type="checkbox"/>
19906485	7/13/2004 2:00 AM	Received	falsche Menge gel...	Harald Bauer	<input type="checkbox"/>
19906486	12/16/2019 1:00 AM	Received	Störung an Zuluß...	Harald Bauer	<input checked="" type="checkbox"/>
19906487	5/31/2007 2:00 AM	Received	Filter verstopft	Harald Bauer	<input type="checkbox"/>
19906489	10/9/2017 2:00 AM	Received	Lüftungsaussen mu...	Emil Zander	<input checked="" type="checkbox"/>
19906496	10/9/2017 2:00 AM	Completed	Arbeits...	Emil Zander	<input checked="" type="checkbox"/>

Call Number	Call Status	Internal	Subject	Specialist	To Do
19906290	In Processing	<input type="checkbox"/>		Harald Bauer	
19906214	In Processing	<input type="checkbox"/>	Arbeits...	Harald Bauer	
19906404	Completed	<input type="checkbox"/>	Arbeitsplan	Jens Black	
19906412	In Processing	<input type="checkbox"/>	Rückmeldung	Jens Ackermann	

Call Status	Handling Type	Internal	Subject	Explanation
Completed	Seitens Vorgehen	<input type="checkbox"/>	Assumption	Coordination and planning of the next step



Detailed overview of all calls

Record questions about the functionality of your products or complaints to your company as a call directly in piaX. In a call, you can specify which part has been complained about or what the complaint is. Therefore, you have all incoming calls at a glance.

Parts catalogue

with inventory information and associated price lists



piaX - Parts Catalog

Price List: 118 - France (EUR) | Price validity: 12022020

Search:

Drag a column header here to specify the column

Part	Part Name (long)	Product Line (long)	Part Type (long)	Search Term	Selection	ABC Class	Price	Price Unit (long)	% Q5 1	% Q5 2	% Q5 3
6000610	Block for Adjustment...	Deco-Only Parts	Purchased Parts	Block	Deckungsteil EK	C	808.00	EUR		0.00	0.00
6000600	Block for Adjustment...	Deco-Only Parts	Purchased Parts	Block	Deckungsteil EK	C	808.00	EUR		0.00	0.00
6000512	Foot with Threaded...	Deco-Only Parts	Purchased Part Class	Fuße	Deckungsteil EK	C	708.00	EUR		0.00	0.00
1300111	CEE Outlet 3x32A, 5...	CEE Devices/Pass...	End Product	Interfence	CEE-PE	B	418.00	EUR		0.00	0.00
1300110	CEE Outlet 3x32A, 5...	CEE Devices/Pass...	End Product	Interfence	CEE-PE	A	418.00	EUR		0.00	0.00
1300120	CEE Outlet 3x32A, 5...	CEE Devices/Pass...	End Product	Interfence	CEE-PE	B	418.00	EUR		0.00	0.00
1300830	CEE Coupler 3x32A...	CEE Devices/Pass...	End Product	Kapplung	CEE-PE	A	418.00	EUR		0.00	0.00
1300811	CEE Coupler 3x32A...	CEE Devices/Pass...	End Product	Kapplung	CEE-PE	A	418.00	EUR		0.00	0.00
1300810	CEE Coupler 3x32A...	CEE Devices/Pass...	End Product	Kapplung	CEE-PE	A	418.00	EUR		0.00	0.00
1300821	CEE Coupler 3x32A...	CEE Devices/Pass...	End Product	Kapplung	CEE-PE	C	408.00	EUR		0.00	0.00
6000511	Cover Plate	Deco-Only Parts	Purchased Parts	Abdeckplatte	Deckungsteil EK	C	408.00	EUR		0.00	0.00
1300121	CEE Outlet 3x32A, 5...	CEE Devices/Pass...	End Product	Interfence	CEE-PE	C	408.00	EUR		0.00	0.00
6000511	Block for Galt	Deco-Only Parts	Purchased Parts	Block	Deckungsteil EK	C	358.00	EUR		0.00	0.00
4700127	Flare Shield 1450 m...	Mailbox System	Make-To-Stock	Reperendek	Dielektron FU	B	348.00	EUR		0.00	0.00
4700126	Flare Shield 1118 m...	Mailbox System	Make-To-Stock	Reperendek	Dielektron FU	B	328.00	EUR		0.00	0.00
1300220	CEE Plug 3x32A, 5H...	CEE Devices/Pass...	End Product	Stecker	CEE-PE	C	318.00	EUR		0.00	0.00
1300211	CEE Plug 3x32A, 5H...	CEE Devices/Pass...	End Product	Stecker	CEE-PE	C	308.00	EUR		0.00	0.00
1300210	CEE Plug 3x32A, 5H...	CEE Devices/Pass...	End Product	Stecker	CEE-PE	A	308.00	EUR		0.00	0.00
6000530	Intermediate Plate	Deco-Only Parts	Purchased Parts	Zwischenplat	Deckungsteil EK	C	308.00	EUR		0.00	0.00
4700125	Flare Shield 1048 m...	Mailbox System	Make-To-Stock	Reperendek	Dielektron FU	B	308.00	EUR		0.00	0.00
1300221	CEE Plug 3x32A, 5H...	CEE Devices/Pass...	End Product	Stecker	CEE-PE	C	308.00	EUR		0.00	0.00
4700137	Flare Shield 1450 m...	Mailbox System	Make-To-Stock	Reperendek	Dielektron FU	B	298.00	EUR		0.00	0.00
4700134	Flare Shield 700 m...	Mailbox System	Make-To-Stock	Reperendek	Dielektron FU	B	288.00	EUR		0.00	0.00
4700136	Flare Shield 1118 m...	Mailbox System	Make-To-Stock	Reperendek	Dielektron FU	B	278.00	EUR		0.00	0.00
4700123	Flare Shield 740 m...	Mailbox System	Make-To-Stock	Reperendek	Dielektron FU	B	268.00	EUR		0.00	0.00
4700135	Unbalance Motor PU...	Screening Machine	Make-To-Stock	Motor	Seibmaschine	B	258.00	EUR		0.00	0.00
4700122	Unbalance Motor PU...	Screening Machine	Make-To-Stock	Motor	Seibmaschine	B	248.00	EUR		0.00	0.00
4700138	Flare Shield 1048 m...	Mailbox System	Make-To-Stock	Reperendek	Dielektron FU	B	238.00	EUR		0.00	0.00

Parts catalogue with inventory information and associated price lists

Have a complete overview of all your parts in a parts catalogue. You can plan all parts in different storage locations. In addition to the overview, we offer you precise inventory information for all parts per warehouse, with all associated price lists.

Feature Overview



Manage contacts easily and clearly

- Simply transfer existing MS Outlook contacts to piaX
- Detailed customer information including addresses, contact person representative, customer status and Show group affiliation
- Detect, record and evaluate leads in order to act in a targeted manner
- Higher data quality by avoiding double entry
- Show customer value with an overview of current offers, open invoices or sales volume
- Customer classification based on individual characteristics such as industry, region, ABC analysis
- Overview of tickets (calls) from the service



Optimize daily work in sales

- Overview of all sales projects including status, products, offers and activities
- Record, maintain and assign competitors to sales projects
- Customer-specific overview of offered and sold products with individual document items
- Analysis and graphic evaluation of sales history and sales figures of individual customers
- Linking sales campaigns to MS Outlook calendars and tasks
- Chronological logging and evaluation of all customer actions, such as phone calls, e-mails or visits to the customer history
- Overview of all sales documents, such as offers, orders, delivery notes or invoices



Document management for less paper mountains

- View and record documents, reports, offers from the DMS of the ERP system
- Direct assignment of visit reports to sales campaigns and appointments
- Send and archive an email directly from the piaX

Feature Overview



Create forecasts for sales management

- Assignment and status maintenance of offers to a sales project
- Weight offer values according to the probability of closing
- Overall view and graphical evaluation of all offer values
- Comprehensive evaluation options for offered product quantities / prices per customer



General functions to simplify daily work

- Comprehensive search, sorting and filter functions in all areas
- Customizable views with storable layouts
- Separation of private and business addresses
- Create, print or export individual lists for further processing
- Link to resubmissions and workflows



Administrative functions

- Synchronization management and definition of access rights according to user groups
- Multi-lingual configurable user interface and address formats
- Multi-client capable



System requirements

- ERP-System proALPHA
- Microsoft Outlook 32 or 64 Bit since 2010/2013/2016
- Microsoft Exchange Server since 2013
- Smartphones with Active-Sync support



Microsoft Partner
Silver Application Development



Contact

Contact your proALPHA partner for more information, or with us on the website www.mobileblox.com or directly at:

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