piaX-CRM

With piaX more movement in your distribution

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piaX-CRM

With piaX more movement in your distribution

With piaX CRM (Customer Relationship Management) you always keep an eye on your customers and prospects. Improve customer satisfaction and increase your sales opportunities. Work efficiently, paperless, and concentrated on the essentials - piaX takes care of the rest.

Access detailed information about your contacts at any time and automatically add them to your work with activities in piaX. The bidirectional interface between piaX and proALPHA allows information to be exchanged quickly and easily. This means that the current data from the ERP system is always available to you in sales, and recent sales information can be passed on directly to the company. This automatically improves the quality of the customer data in the ERP and there is no double data storage.

piaX CRM is integrated into Microsoft Outlook and automatically connects your activities with calendar entries or tasks. Incoming and outgoing e-mails can be quickly filed with the contact and are therefore also available in the proALPHA DMS. With piaX you can work wherever you want. All data is available offline.

From prospect and relationship management to activity management to map display with proximity search, dashboards or the machines and system information of your customers, piaX offers a wide range of functions to support your sales in a targeted manner.

The positive side effect:

more transparency and time for acquisition.

Efficiency in sales with piaX CRM:

- More transparency and overview - 360° view of your customers and sales opportunities
- Considerable time savings - prepare customer visits without consulting third parties
- High employee acceptance thanks to a simple interface that is fully integrated in Outlook
- Complete access to all data at any time thanks to 100% offline capability
- Bidirectional interface to proALPHA - 100% of all data from the ERP system
- Extension of the proALPHA standard with practical additional

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Basic functions of piaX-CRM

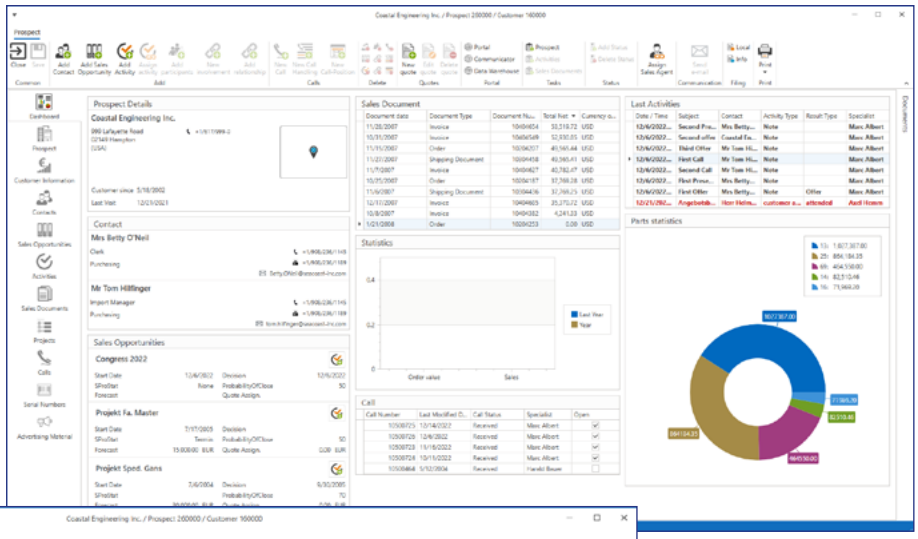
Customer Dashboard / Customer info

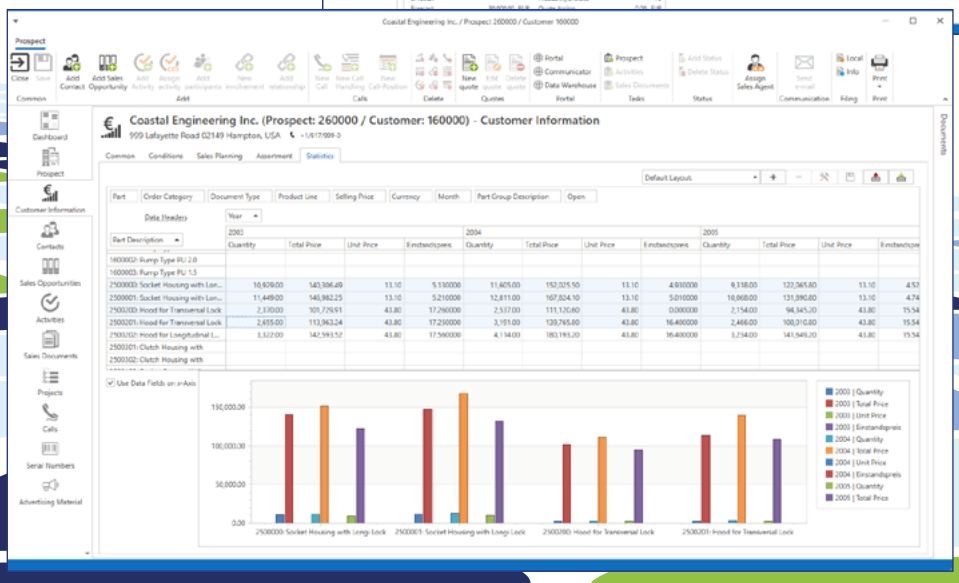
Do you need a quick overview of your customers? Just before the appointment, check the last activities, receipts, and calls? With the customer dashboard in piaX you quickly get an overview of your customers. Do you need further details/information? With one click, you get to the activities or the document details.

When connected to a telephone system, direct dialing via the telephone numbers is possible. For incoming calls, piaX opens automatically with the contact person of the contact - so you know in seconds who is calling and can call up the last activities. This saves time, and you can provide information more quickly.

Features

- Customer details with map display (optional route planning module)
- Contacts
- Sales opportunities
- Last activity
- Last receipts
- Open calls (complaints)
- Sales and parts statistics





That offers you piaX-CRM

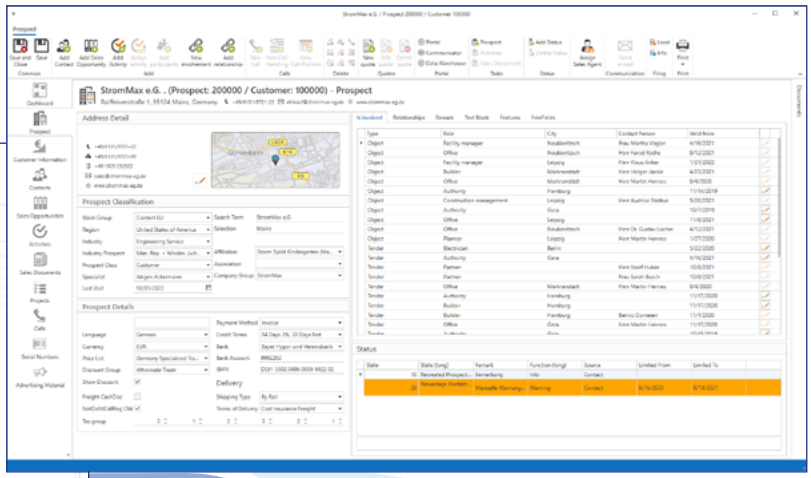
Lead management and master data maintenance

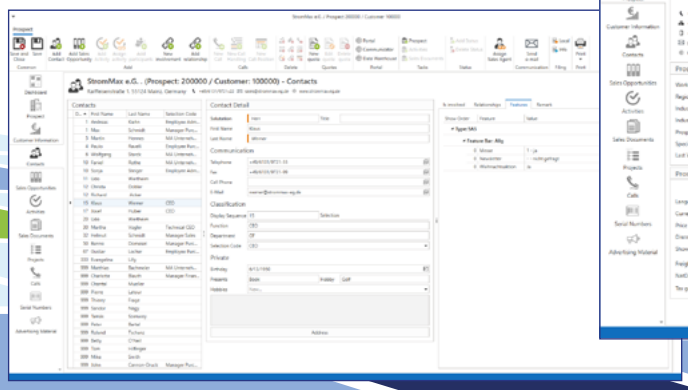
All departments work with the same data - whether sales, production, or service. The data from both systems are compared and synchronized with each other via the bidirectional interface. Contacts or contact persons recorded in piaX are available to all employees in proALPHA, piaX and on mobile devices.

In piaX you can re-record and classify leads (contacts) - according to standardized industry codes or freely selectable criteria. Using a workflow in proALPHA, the back-office staff can check and supplemented this data, for example, so that you can ensure the high quality of your data. The data collected in this way can then be used for target group segmentation and analysis.

Features

- Collection, processing, and classification of contacts (prospects) and customers
- Processing of characteristics for the contact or customer
- Texts for the prospect / contact person
- Use the Outlook contacts in your smartphone's address book
- Creation and processing of contact persons
- Direct call or opening a prospect on incoming call (if supported by TK)
- Storage of all contacts and contact persons as Outlook contacts
- Creation and processing of contact persons
- Transfer of existing Outlook contacts
- Condition of the prospect





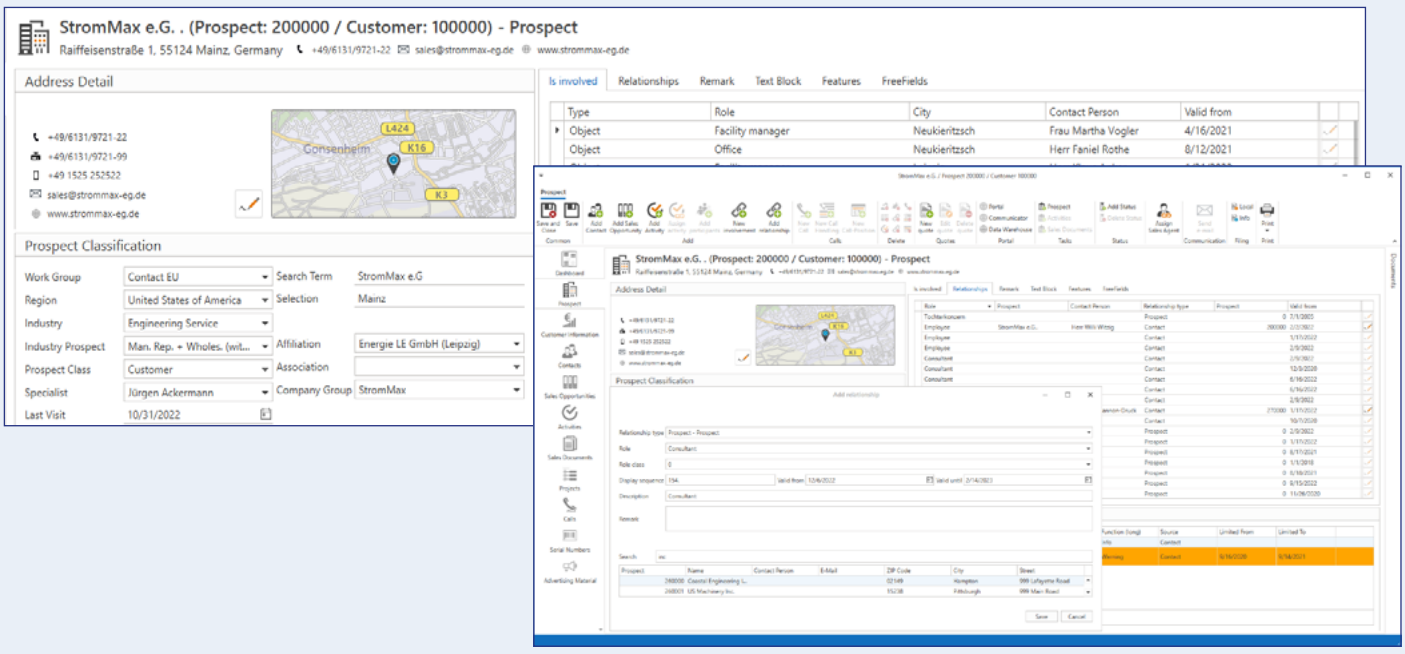
Basic functions of piaX-CRM

Stakeholders and relationships

Who participated in which projects? In which company did the contact person work before?
What is the relationship between companies?
The world of relationships is diverse - in piaX and proALPHA you can map them and get a quick overview.

Features

- Networking of any prospects, clerks, and contact persons with each other
- Role assignment with validity period and weighting
- Assignment of participants (prospects, clerks or contact persons) to sales opportunities, objects, and tender (object management) or serial numbers
- Contact person history with change of company



That offers you piaX-CRM

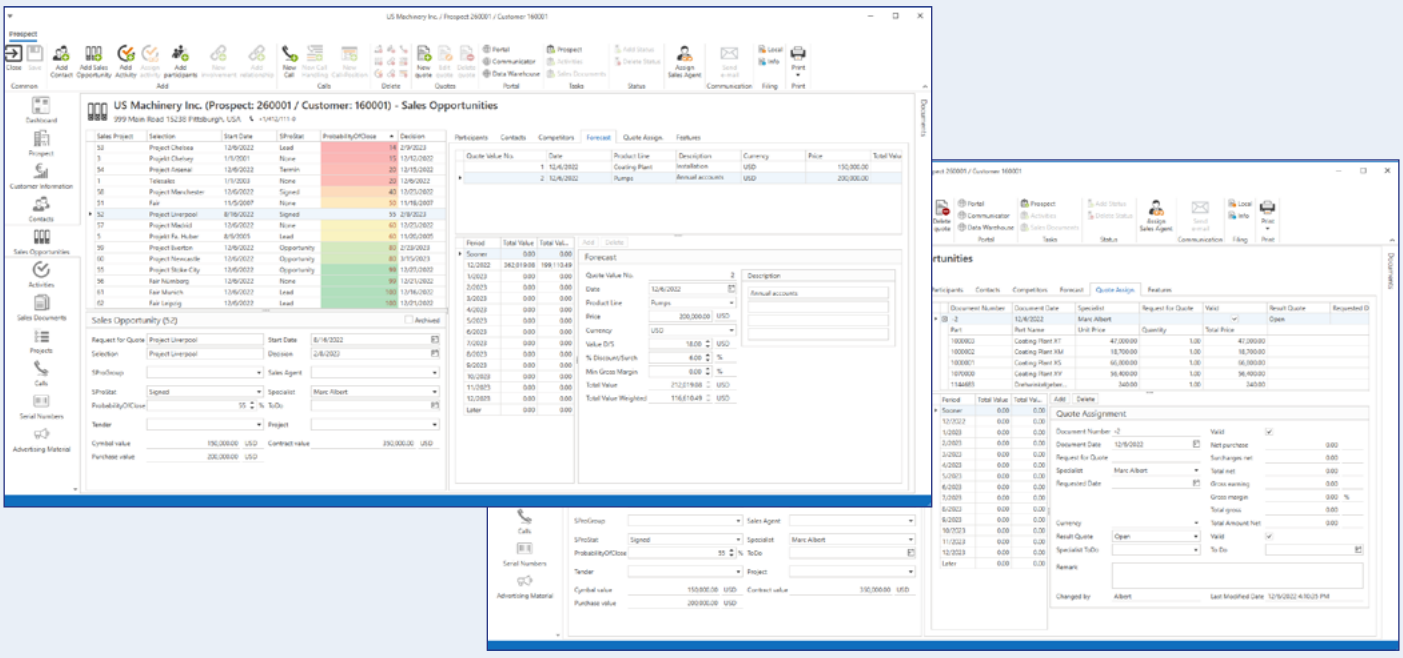
Opportunity Management - Sales opportunities + forecast

Are you wondering where your greatest potential lies? What does the sales funnel look like for the next few months? Record and qualify your sales projects with detailed information such as the probability of completion, forecast values, participants, or information about the competition.

With assigned offers, you always have an overview and can easily track them. This creates more transparency in your sales process. With the flexible list views, you always have an overview in piaX and thus increase the closing rates and sales.

Features

- Registration and processing of sales opportunities
- Evaluate opportunities and store forecast values
- Flexible list views to evaluate sales opportunities with weighted and unweighted values according to the probability of closing
- Assignment of participants
- Allocation of offers and offer tracking
- Link to Competitors



Basic functions of piaX-CRM

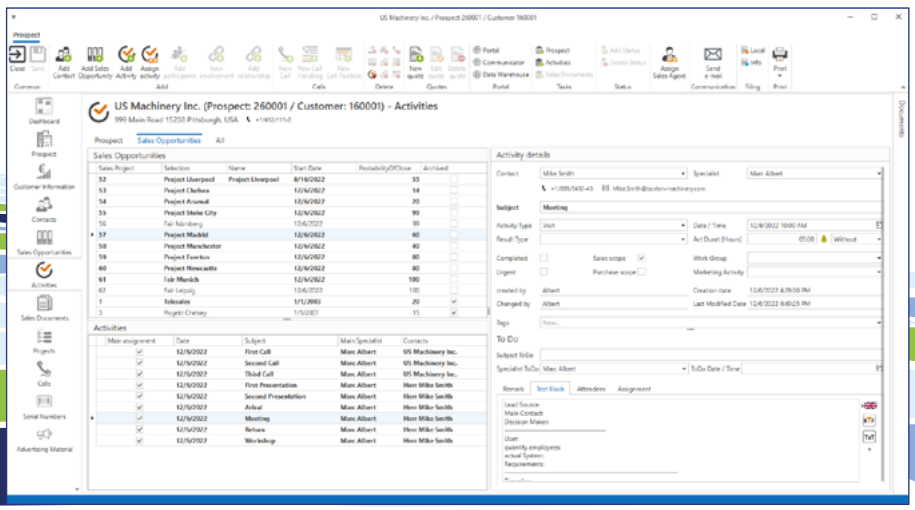
Activities + Outlook integration

PiaX expands the proALPHA standard to make your day-to-day sales even more efficient. Document and control all interactions with your contacts via activities (sales promotions).

Whether on-site visits, correspondence, phone calls or acquisition - with the activities you clearly document your sales process and are thus able to provide information more quickly. Make your day-to-day business easier by calling up text modules for visit reports or lead qualification. Appointments are automatically created in your calendar or as a task. Categorize your activities and add additional tags. You can use these keywords to find important activities on a topic at any time.

Features

- Extensive classification and segmentation by action and result types and tags
- Multiple assignment and link to sales project, contact, object, intention, project, project process
- Enter remarks and texts easily by using text modules
- Assignment of any prospects or contact persons
- Synchronous with Outlook calendar and Outlook tasks
- Synchronous with calendar on smartphone (IOS & Android)
- Changes to the calendar entry are reflected in the activity
- Transfer of existing Outlook calendar entries and contacts to piaX
- Triggering workflow activities in proALPHA
- resubmission function
- File e-mails directly as an activity
- Flexible lists for simple reporting



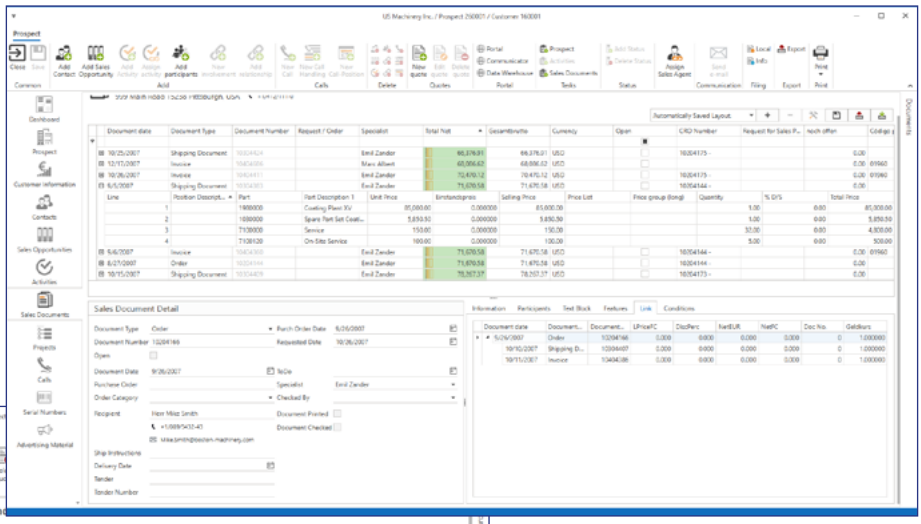
That offers you piaX-CRM

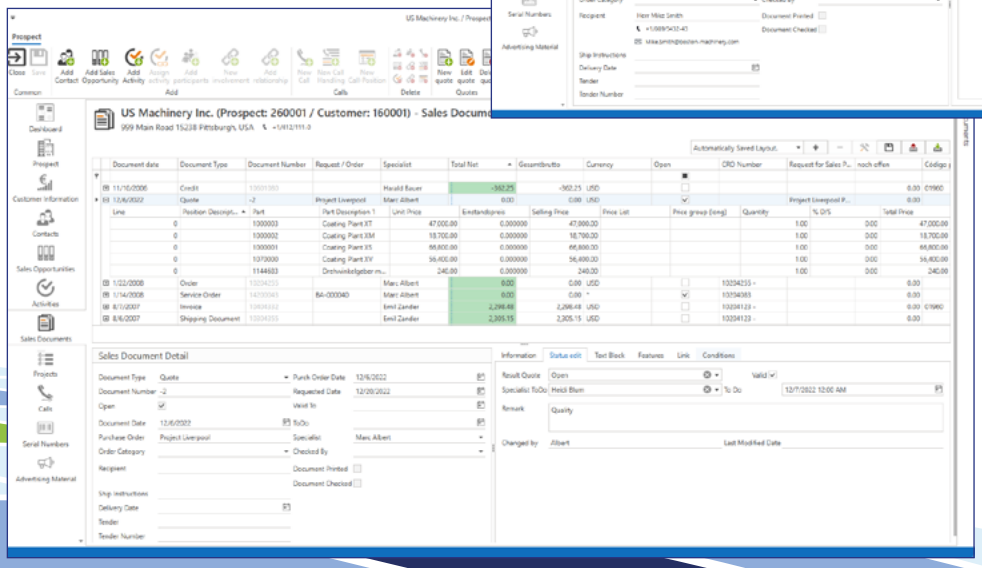
Receipts / Offers / Offer Tracking

When working in the field, it is always important to be able to view the current sales documents from your customers. This includes offers, orders, delivery notes or invoices. In piaX you have access to the last receipts and the receipt items at any time. This gives you a complete overview, and you are always able to provide information. And that, without queries in the office. This means your sales department works more efficiently and can concentrate on selling.

Features

- Sales documents such as offers, orders, invoices, or credit notes from proALPHA
- Display of the service orders for the customer
- Direct editing of the offer status in the offer assignment
- Characteristics and statuses for the document
- Extensive lists and statistical functions
- Including all document items
- Display of the document link





Basic functionsof piaX-CRM

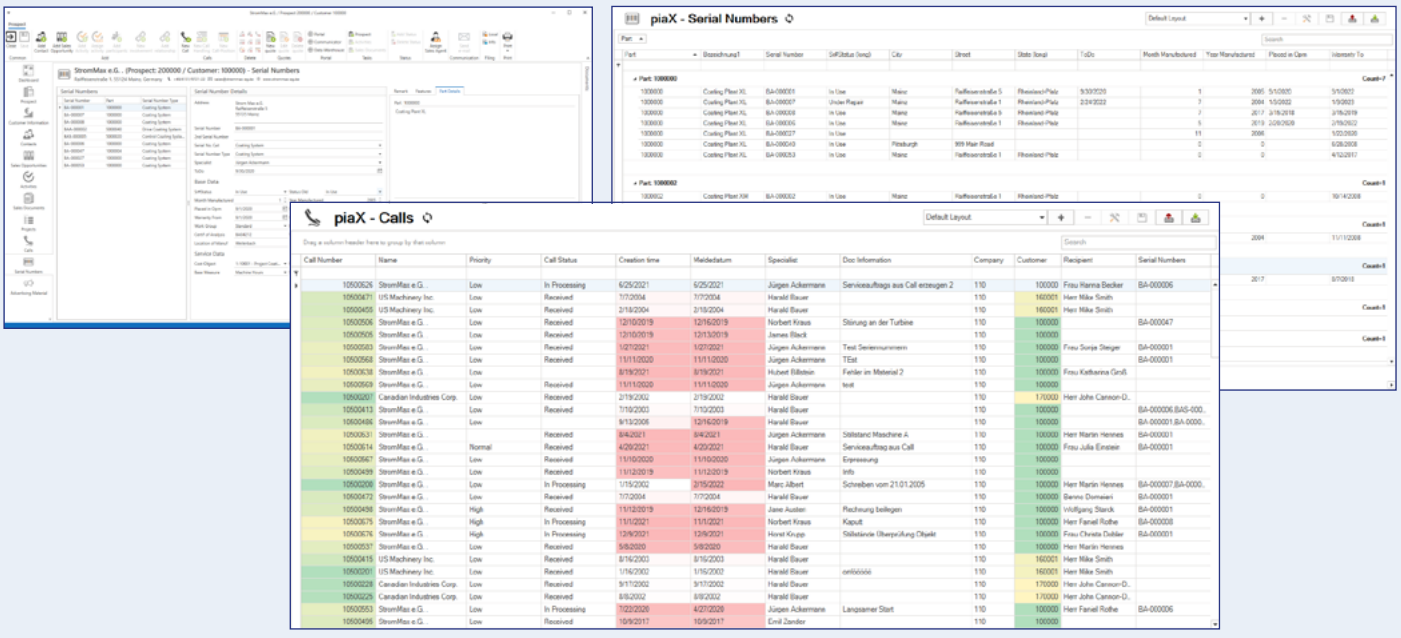
Calls / Serial Numbers

Are you a machine or plant builder, and do you work with serial numbers in proALPHA? Then you can easily see in piaX which machines or systems are with which customers. Select specific machine types and see which of your customers are using them. Then, by selecting certain machine types, you can see which machines or systems are used by which customers. Use the data to make targeted follow-up sales or to offer the customer additional products.

Complaints are recorded in proALPHA as a call. In sales, it is important to see exactly this information to be prepared for customer questions. That is why the call information is provided in piaX so that you always have an overview of open problem cases with your customers.

Features

- Information about a customer's serial numbers
- Serial Number Details
- Notes and characteristics of serial numbers
- Standstills to the serial number
- Information about calls



Basic functionsof piaX-CRM

Parts Statistics / Lists

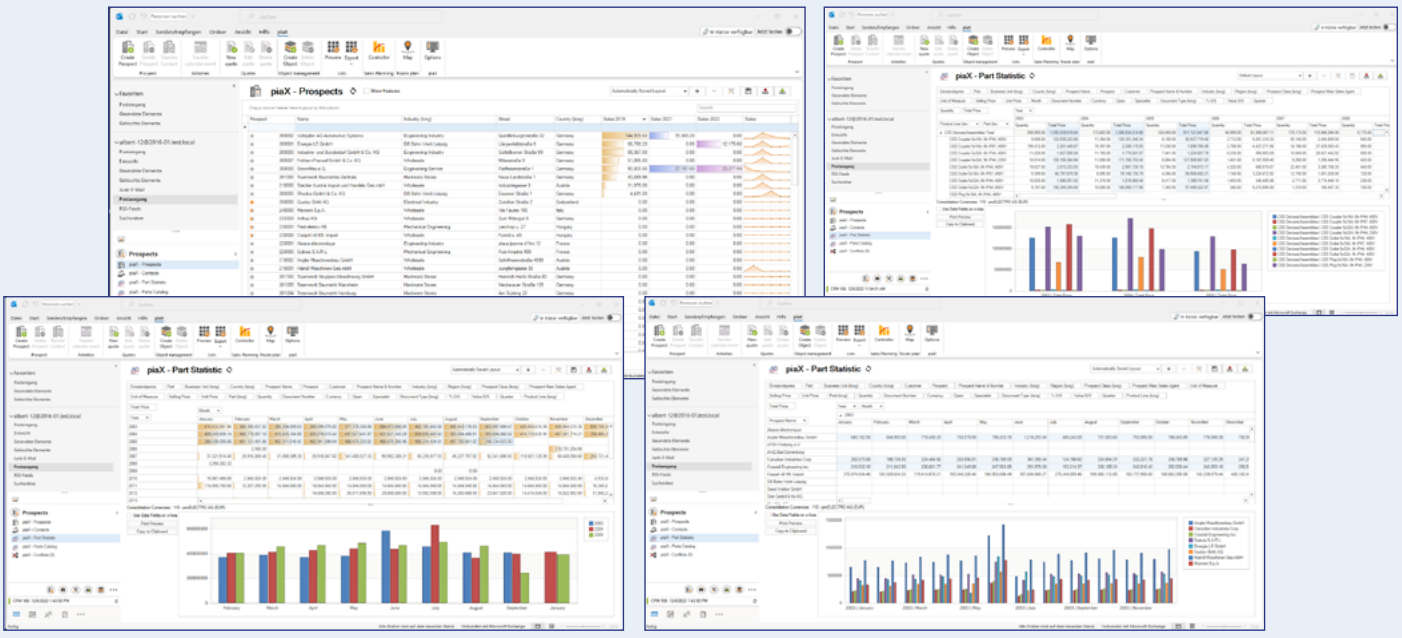
Do you need a quick overview of your customers in an industry or region? The piaX list views give you extensive search and filter options. And best of all - the settings can be saved so that you can access this evaluation with the current data very quickly.

Significantly more complex evaluations can be compiled with just a few clicks using the piaX parts statistics. Whether it is evaluating last year's sales by industry, agent, or parts group - or the quantity sold of a specific part. You can put together the information you want by dragging and dropping.

Features

The evaluation can be based on the following categories:

- Offer, order, or sales information (value or quantity)
- Customer / customer classification
- Receipt / surcharges
- Object / tender
- Parts / parts group / division
- Representative / clerk
- year / quarter / month



Additional modules piaX-CRM

DMS

With the DMS module, you can also access all documents while on the go. Whether documents for the customer or for an activity, for the serial number or for a call - view documents quickly and easily at any time and archive new documents. Permissions, size restrictions and permitted file types set in proALPHA are considered during archiving. Indexing is done automatically. Storing e-mails in the DMS is particularly easy, with which you can assign and archive an e-mail with two clicks. Archiving files via drag & drop or taking photos directly from piaX is just as quick.

Price and inventory information

Send the current price lists with Excel to all field staff every month? Not with piaX. With price and stock information, you have up-to-date price information and can view and provide information on the stocks of individual items. This saves you a lot of work and gives you reliable information when talking to customers.

Pre-entry of offers

After the customer visit, put together all the parts you want in a new offer? Or adjust an existing offer in a customer meeting? No problem with pre-booking. Add items from the parts master and adjust prices and discounts.

Travel expense recording

Enter travel expenses directly from the Outlook calendar. This makes it easier to record travel expenses, since the visits are also taken over at the same time. In addition, the times and costs can be recorded. These are then released by a travel expense controller via a workflow.

Additional modules piaX-CRM

Route planning

A card says more than a thousand words .... With piaX route planning you can display your contacts, customers, or objects on a map. You can use the proximity search to search for nearby contacts. For example, you can use an individually adjustable color marking to see briefly which contacts you have not visited for a long time and calculate the route there straight away.

Call processing

In the customer meeting, the customer tells what problems he is currently having. With call processing, the sales force can immediately open a new call in which the customer's problem is recorded, and the affected machine is assigned. This ensures a structured recording and fast processing of the customer problem, and no information is lost.

Additional functions proALPHA-CRM

Object management

With object management, you can map objects such as buildings and assigned projects. To do this, you can enter participations and monitor schedules for the projects. Due to a deep integration with the sales documents (offer, order, invoice, ...) these can be assigned to the projects and objects. This way, you always have an overview of the various offers for a project. A link to the service area is also provided so that serial numbers and service objects can be linked to objects.

Suppliers, competitors, and representatives as contacts

Do you also want to document visits or notes to suppliers, competitors, and representatives with activities? Do you want to assign suppliers as participants to a sales project or a plan? With our extension you can connect contacts with suppliers, competitors, and representatives.

Additional functions proALPHA-CRM

Activities instead of sales campaigns

Activities are significantly more flexible than sales campaigns. Contact persons from other contacts can be assigned to an activity, the activities can be assigned to several sales projects at the same time and additional keywords can be stored via the tags for efficient evaluation.

Relationship networks

With the relationship networks, it is possible to map connections between two contacts or contact persons. In this way, connections that support you in the sales process can be made visible. In addition, it is possible to map the historical development of a contact person. I.e., You can see which companies the contact person has been to before.

Involved

Assignments between sales projects, plans, objects, serial numbers, and service objects as well as contacts, contact persons or clerks can be made with the participants. A role, a period and an evaluation can be stored. Conversely, the contact, contact person or clerk can then show where they are involved.

Improved offer matching

With the improved offer mapping, the status update between the assigned offer (on the sales project) and the actual offer is automated. It can be set that the offer is automatically archived if the status of the assignment has been set to „lost". Conversely, the status can be set to won if an order is created from the offer.

Newsletter connection

Select the addressees for a marketing campaign in proALPHA. By connecting to the newsletter, the data of the addressees are automatically compared with the newsletter provider. Bounces and cancellations are also returned to proALPHA and are stored there in the characteristics of the contact person.

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Contact

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