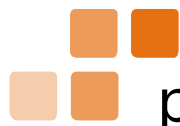


piaX object- management

*The CRM for project business
and construction industry*







piaX object management

The CRM for project business and construction industry

The property business is often characterized by great dynamism and complexity: contact persons, decision-making competencies or even the property planning itself change frequently.

With the piaX object management you keep the overview. You can intuitively record all relationships and adjust them if necessary. The object always remains in focus.

All construction projects and object data are managed and evaluated directly in proALPHA or MS Outlook. In this way, piaX property management supports your sales force in discovering and pursuing recent sales opportunities.

The piaX object management was developed in cooperation with:

theben[®]



- Fully integrated in pro-ALPHA as an additional module
- Mobile and offline available as MS Outlook add-in

Your advantages with the piaX object management:

- More transparency in networked projects and relationships
- Shorter response times through fast access to the core data
- Look at relationships, sales documents, or activities from an object perspective
- A better overview thanks to the hierarchical display of objects and projects
- Understand which people have worked on which projects in which function
- Systematic tracking of tenders and offers

This is what the piaX object management



■ ■ 360° view of objects

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

■ ■ Mapping of relationship networks

- Create object-specific roles
- Overview of all relationships beyond the project duration
- Looking at relationships from different perspectives

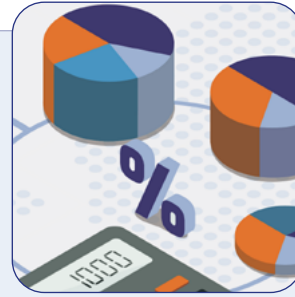
■ ■ Efficient editing of objects

- Simplified tracking of offers
- Recording of plans for objects
- Creation of forecasts
- Overview of all activities

■ ■ Work directly in proALPHA and MS Outlook

- Complete integration in proALPHA and MS Outlook including document management
- Link to sales documents and service
- Extensive search and filter function
- Mobile access to property data, also offline

Efficiently edit objects via projects



Efficiently edit objects via projects

In our object management module especially for proALPHA you create your objects with all relevant information and classify it. Arrange for an even more efficient way of working Assign various projects to your objects, which can be e.g., tenders. Accidentally with the corresponding deadlines, characteristics, trades, probability of completion and much more, you are best informed which orders are waiting for you soon.

Objects

File Function View Tools Master Files Info

Object number archived

Parent object no.

Description

Search Term Selection

Basic Data | Address | Parameter | Remark | Text | Changes |

Object Type KH Work Group STR

Object class B Specialist Ackermann

Object state networked ToDo 14.09.2018

Region EDE

Tender List to Object 1

File Function Master Files Info

TendNo	Arch	Craft	Description	Description 2
30000055	nein		Lighting	
30000069	nein		Refurbishment of	

Tender

File Function View Tools Master Files Info

Tender number 30000069 archived

Object number 1 archived

Craft

Parent tender no.

Description

Search Term Selection

Basic Data | Address | Parameter | Remark | Text | Changes |

Tender type

Tender class

Tender state created

Work Group

Specialist Bauer

ToDo

Activities Object 1

File Function Master Files Info

only not done

Act	Main	Date	Tm	ActDur	Specialist	ATyp	Des	ATyp	RTyp	Des	RTyp	Subject	Urgt	Cmpl
155	ja	27.05.2020	14:01	0,00	Ackermann	6	customer acquisition		0			Besichtigung	nein	nein
195	ja	12.05.2020	10:27	0,00	Bauer	0	Note		0			Werbeanruf	nein	nein
196	ja	12.05.2020	10:29	0,00	Bauer	0	Note		0			Kundengewinnung	nein	nein
240	ja	04.09.2020	09:02	0,00	Bauer	1	Phone Call		11	Presentation		DD Daniel Rau --	ja	ja
331	ja	05.02.2021	14:29	0,00	Ackermann	5	E-Mail		0			AW Projektanfrage neue Konzernzentrale	nein	ja
431	ja	08.01.2021	10:28	0,00	Bauer	0	Note		0			Zugfahrt	nein	nein
529	nein	25.03.2021	08:50	1,00	Trautmann	6	customer acquisition		0			Besuch	nein	nein

display complex relationships transparently



Map complex relationships transparently

With the piaX object management you can see which projects a person was involved in and in which role. Furthermore, you can find out with just a few clicks which projects exist for a prospect and who the contact is. In the role list for the object, you can see which participants are responsible for you are already known and which participants are still missing. That completes the preparation for the next Meetings and negotiations closed!

Prospects

Prospect/Customer: 260000 160000
 Name: Coastal Engineering Inc.
 Street: 999 Lafayette Road
 City: US 02149 Hampton

Search Term: []
 Selection: []
 Specialist: Bauer

Basic Data | Parameters | House Bank | Remark | Free

Work Group: EU
 Industry: IE Electrical Industry
 Region: AUS United States of Ar
 Industry Prospect: 51000 Man. Rep. + Whole
 Prospect Class: K Customer
 Domestic Tax ID: []
 last Visit: 27.01.2022

Assignment of participants to Tender 30000055

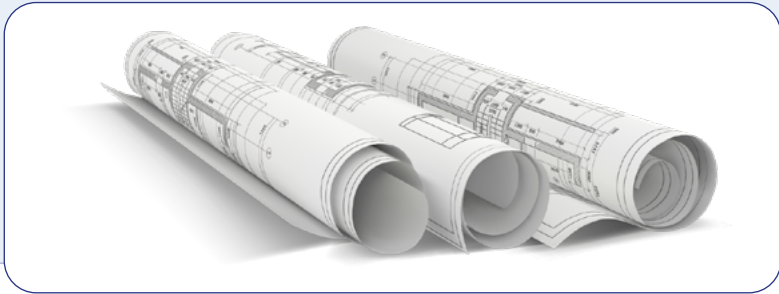
Role	Des. Role	ustomer	Prospect Name	Name
10 ARCH	Architect	160000	260000 Coastal Engineering Inc.	
11 BL	Construction management	190240	200011 Echter Name Rentnerheim	
12 AMT	Office	100000	200000 StromMax e.G.	Herr
13 PL	Project manager	100000	200000 StromMax e.G.	
18 LF	Supplier	190239	200010 Storm Spirit Kindergarten	
19 LF	Supplier	190242	200013 Viper AG	

Prospect: 260000 Coastal Engineering Inc. Role: ARCH Architect
 Contact No.: 0 Valid from: 09.12.2022
 Specialist: [] Valid until: []
 Role class: 0 Display Sequence: 10 [] archived

Tender List Prospect 260000 [Customer 160000]

TendNo	Des Rol	RoICl	Role	From	Until
30000055	Architect	0	ARCH	09.12.2022	
30000056	Office	0	AMT	09.12.2022	
30000057	Office	0	AMT	09.12.2022	
30000058	Office	0	AMT	09.12.2022	

object management directly in proALPHA



Object management directly in proALPHA

The big advantage of the piaX object management is the complete integration into proALPHA as an additional module. Put in order your clerks, regions, sales projects, etc. directly to an object. From sales to billing all work with the same current data.

Especially for the service area, the piaX object management offers an enormous advantage! By assigning serial numbers and service objects to an object or sub-object, you register where which products are from you and can adapt changes in no time at all!

Objects □ ×

File Function View Tools Master Files Info

Object number archived

Parent object no.

Search Term 📄 📄 📄 📄

Selection

Description

Basic Data |
 Address |
 Parameter |
 Remark |
 Text |
 Changes

Object Type

Object class

Object state

Region

Work Group

Specialist

ToDo

Object code

OSC

number of Sub-objects

piaX objekt management directly in MS Outlook



piaX objekt management directly in MS Outlook

With the mobile version of the object management, you have access to your ongoing processes, contact or information about the property, anytime and anywhere. Capture all parent and child object information easily.

1 / Swimming Hall

Save and Close Save Add subobject Delete object Add tender Delete tender Add activity Object Tender Add Status Delete Status Add participants

Object/Tender
Laubert, Heorge Town Pike 5, 07545 Washington

Objects

Object number	Description 1
1	McAllan Swimming Hall
2	Sauna Area
20000300	Finnish sauna
20000301	Whirpool
20000024	Stream sauna
20000302	Stream Room
20000073	Machine Room
3	Swimming pool
4	Diver pool
20000017	Children's pool
20000019	Waterlides

Object details

Description: McAllan Swimming Hall
 Description: Washington
 Address: Laubert, Heorge Town Pike 5, 07545 Washington
 Object number: 1. archived Search Term: Sport
 Region: United States of America Selection: Washington
 Object state: networked Work Group: Struktur
 Object class: B Specialist: Jürgen Ackermann
 Object Type: Schwimmbad To Do: 9/14/2018
 Object code: Park_0815 Role list:
 OSC: 1

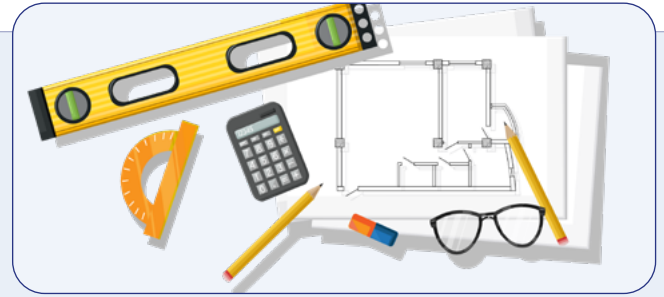
Tender

Tender number	Description 1
30000055	Lighting
30000069	Refurbishment of the pumps
1	Expansion of the pumping station
12	Generators
8	Laying tiles
5	Plunge pool refurbishment
30000001	New ladder
30000018	Chlorine launcher
30000077	Chlorine bracket
30000100	Sterilization

Participants

Main assignment	Datum/Uhrzeit	Main Contact	Subject	Activity Type	Result Type	Specialist	Completed
<input type="checkbox"/>	2/13/2020 12:00:00...	Frau Sabine Fichter	Kickoff	Visit	Offer	Bauer	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	4/14/2020 11:59:00...	Haindl Maschinen Ges.m.bH	Call	Note	Presentation	Bauer	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5/27/2020 2:01:00...	Herr Helmut Schmidt	Visit	customer acquisition		Ackermann	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5/12/2020 10:27:00...		Add call	Note		Bauer	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5/12/2020 10:29:00...		Customer acquisition	Note		Bauer	<input type="checkbox"/>
<input checked="" type="checkbox"/>	9/4/2020 9:02:00...		Payment	Phone Call	Presentation	Bauer	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2/5/2020 2:29:00...		Project request	E-Mail		Ackermann	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1/8/2021 10:28:00...		Offer	Note		Bauer	<input type="checkbox"/>

Document all projects clearly



Document all projects clearly

Manage all your projects easily with the help of tenders. Structure complex work assignments in a detailed and structured manner with sub-tenders and ensure the seamless integration of important tasks on site.

The screenshot displays the piaX software interface for a tender titled "Expansion of the pumping station / 1". The interface is divided into several sections:

- Left Sidebar:** Contains navigation icons for Object/Tender, Activities, Sales Documents, Serial Numbers, and Calls.
- Object Tree:** A hierarchical list of objects under "McAllan Swimming Hall", including "Sauna Area", "Finnish sauna", "Whirlpool", "Steam sauna", "Machine Room", "Swimming pool", "Diver pool", "Children's pool", and "Waterslides".
- Tender Details:** A form containing fields for Description, Address, Search Term, Selection, Tender state, Tender class, Tender type, Craft, and Tender code.
- Summary:** A table showing financial and scheduling data:

Total Forecast	0.00
Total weighted Forecast	0.00
Total quotes	1,483,756.30
Total weighted quotes	1,335,380.67
Number of quotes open/total	7 / 12
- Table:** A table with columns: Main assignment, Datum/Uhrzeit, Subject, Activity type, Specialist ToDo, Main Contact, Specialist, Completed, and Urgent. It lists activities like "Check everything", "First activity", "Pump order", "First payment", and "Last payment" with their respective dates and contacts.



Detailed overview of all activities



Detailed overview of all activities

With the help of activities, the work steps to be carried out are stored, including the consideration of the required resources and the duration of the implementation. Take advantage through minimized workload of the intuitive recording and further processing.

1 / Swimming Hall

plax
Save and Close Save Add activity Delete activity Assign activity Object Tender Activity

Object/Tender
Object/Tender
Activities
Sales Documents
Serial Numbers
Calls

Object: McAllan Swimming Hall / 1
Laubert, George Town Pike 5, 07545 Washington

Object number	Description 1	Date	Main Contact	Main Specialist
1	McAllan Swimming Hall			
2	Sauna Area			
20000300	Finnish sauna			
20000301	Whirlpool			
20000024	Steam sauna			
20000302	Steam Room			
20000073	Machine Room			
3	Swimming pool			
20000017	Diver pool			
20000019	Childrens's pool			
	Waterslides			

Date	Main Contact	Main Specialist
2/13/2020	StromMax e.G.	Harald Bauer
3/25/2021	Herr Faniel Rothe	Markus Trautmann
4/14/2020	Haindl Maschinen Ges...	Harald Bauer
5/27/2020	Herr Helmut Schmidt	Jürgen Ackermann
5/12/2020		Harald Bauer
5/12/2020		Harald Bauer
9/4/2020		Harald Bauer
2/5/2020		Jürgen Ackermann
1/8/2021		Harald Bauer
2/21/2022		Harald Bauer

Activity details

Contact Person: StromMax e.G. Specialist: Harald Bauer

Subject: Kickoff

Activity Type: Visit Datum/Uhrzeit: 2/13/2020 12:00 AM

Result Type: Offer Act Durat (Hours): 02:00 7 Hours

Completed: Sales scope: Work Group: Termin

Urgent: Purchase scope: Marketing Activity: Newsletter 2/2004

Created By: Bauer Entry Date: 2/13/2020 1:42 PM

Changed By: Albert Change Date: 12/8/2022 4:13 PM

Tags: User training Offer New...

Remark: Text Block Attendee Assignment

Shakur was born in New York City to parents who were both political activists and Black Panther Party members. Raised by his mother, Afeni Shakur, he relocated to Baltimore in 1984 and to the San Francisco Bay Area in 1988. With the release of his debut album *Paralypse Now* in 1991, he became a central figure in West Coast hip hop for his conscious rap lyrics.[1][4] Shakur achieved further critical and commercial success with his follow-up albums *Strictly 4 My N****r* (1993) and *Me Against the World* (1995).[15] His Diamond certified album *All Eyez on Me* (1998), the first double-length album in hip-hop history, abandoned his introspective lyrics for volatile gangsta rap.[6] In addition to his music career, Shakur also found considerable success as an actor, with his starring roles in *Juice* (1992), *Poetic Justice* (1993), *Above the Rim* (1994), *Bullet* (1996), *Gridlock'd* (1997), and *Gang Related* (1997).

Errors



Deep networking through the assignment of participants



Deep networking through the assignment of participants

You can add any number of participants to objects, sub objects, tenders, or sub-tenders. Optimize your use of human resources and get a detailed overview of all participants with associated roles.

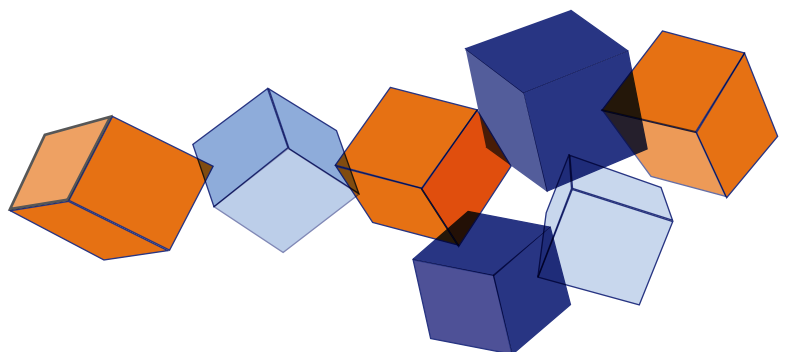
Object: McAllan Swimming Hall / 1
Laubert, George Town Pike 5, 07545 Washington

Object details

Description: McAllan Swimming Hall, George Town
 Description: Washington, County
 Address: Laubert, George Town Pike 5, 07545 Washington
 Object number: 1, archived: Search Term: Sport
 Region: United States of America, Selection: Washington
 Object state: networked, Work Group: Struktur
 Object class: B, Specialist: Jürgen Ackermann
 Object Type: Schwimmbad, ToDo: 9/14/2018
 Object code: Park_0815, Role list:
 OSC: 1

Assignment	Name	Role	E-Mail	Valid from	Assignment
•	Frau Sonja Steiger	Operator	Sonja.Steiger@haindl-graz.at	1/1/2019	Contact Person
•	Frau Charlotte Blauth	Architect	Charlotte.Blauth@angerer-linz.at	10/14/2021	Contact Person
•	Herr Helmut Schmidt	Owner	Helmut.Schmidt@angerer-linz.at	11/14/2018	Contact Person
•	Herr Gustav Locher	Architect	Gustav.Schuster@birkli-ag.ch	9/14/2018	Contact Person
•	StromMax e.G.	Authority	sales@strommax-eg.de	10/7/2019	Prospect
▲	Herr Frank Jürgens	Builder	Ackermann-03@2016-01.test.local	11/19/2020	Contact Person
▲	Herr Frank Jürgens	Authority	Ackermann-03@2016-01.test.local	2/24/2022	Contact Person
▲	PANA Hausmeisterservice Berlin	Operator	kontakt@pana-berlin.de	10/14/2021	Prospect
•	Frau Chantal Mueller	Facility manager	Chantal.Mueller@dubois-chassius.fr	11/14/2018	Contact Person
▲	Herr Audrius Statkus	Construction management	statkus@klima-statkus.de	5/20/2021	Contact Person

*piaX - object management
directly in proALPHA*



Overview of all serial numbers



Overview of all serial numbers

For the clear identification of parts, assign serial numbers in proALPHA. This gives you an overview of all serial numbers that belong to an object or sub-object.

1 / Swimming Hall

Object: Swimming Hall / 1
Laubert, George Town Pike 5, 07545 Washington

Objects

Object number	Description 1	Description 2
1	McAllan Swimming Hall	George Town
2	Sauna Area	
20000300	Finnish sauna	
20000301	Whirlpool	
20000024	Steam sauna	
20000302	Steam Room	
20000073	Machine Room	
3	Swimming pool	
4	Diver pool	
20000017	Children's pool	
20000019	Waterslides	

Serial Numbers

Assignment	Serial Number	Part
●	BA-000008	Filteranlage Mod 28 AA
▲	BA-000017	Beschichtungsanlage XT
▲	BA-000018	Filteranlage Mod 28 AA
▲	BA-000019	Filteranlage Mod 28 AA

Serial Number Details

Address: Strom Max e.G.
Raiffeisenstraße 5
55133 Mainz

Serial Number: BA-000008

2nd Serial Number: _____

Serial No. Cat: Coating System

Serial Number Type: Coating System

Specialist: _____

ToDo: _____

Base Data

Si#Status: In Use | Status Old: In Use

Month Manufactured: 7 | Year Manufactured: 2017

Placed in Oprn: 3/15/2018 | Warranty Period: 365

Warranty From: 3/15/2018 | Warranty To: 3/15/2019

Work Group: Standard | Maintenance: _____

Certif of Analysis: _____ | Version: _____

Location of Manuf: _____

Service Data

Cost Object: _____ | Resource Category: _____

Base Measure: Hours | Service Interval: Time-Dependent

Remark: Part 1000000
Coating Plant XL

Documents

Errors

The functions at a glance



■ ■ *360° view of objects*

- Collection of object data such as address, designation, and status
- Assignment of participants to the object (builder, architect, project manager, responsible employees)
- Mapping of object hierarchies by structuring them into sub- and super-objects
- Possibilities for classification and segmentation via region, type, class as well as freely definable characteristics
- Flexible assignment options
- Preconfigured object information sheet for a 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 via class, type, probability of completion and freely definable characteristics
- Mapping of project hierarchies by structuring them into sub- and super-projects e.g. for different trades
- Preconfigured project information sheet
- Creation of forecasts with requested products, probabilities of closing and offer values

■ ■ *Record all contract business activities*

- Collection of visit reports
- Planning and editing activities
- Schedule activities such as phone calls or visits to be followed up
- Multiple assignment of an activity, e.g., to objects, projects, and prospects
- Assignment of several participants to an activity
- Display of activity history

The functions at a glance



■ ■ *Mapping of relationship networks*

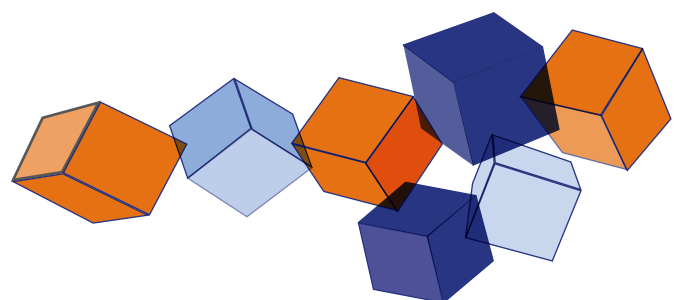
- Creation of object-specific roles
- Definition of role lists depending on the object type for a quick overview of the contact persons
- Overview of all relationships beyond the project duration
- Consideration of relationships from different perspectives, e.g. „In which projects does the person work in what function?“ or „Who was involved in this project?“
- Linking of prospects, contacts, and clerks in multi-layered relationships

■ ■ *Work directly in proALPHA and MS Outlook*

- Complete integration in proALPHA and MS Outlook (link e.g., to sales projects, customers, module service, module project management)
- Bidirectional interface for working with a database
- Mobile access to property data
- Document management for filing property-related documents
- Integration of workflows, reminders, and feature bars
- Extensive search and filter function
- Customizable views and layouts
- Defining authorizations down to field level

■ ■ *Supported proALPHA versions*

- From proALPHA 6.1, 6.2, 7.1, 7.2, 8, 9 and higher, further details on request



Are you interested in our products, or are you looking for a mobile solution for your field service? Then look at our website or arrange an individual presentation appointment.




Digitize your processes with piaX!

Contact

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