piaX CRM standard and modules
piaX 3.2 for proALPHA-Function description

Contact- and customer management

Adressmanagement

Adress information

- Contact addresses, contact persons
- Detailed characteristics (industry affiliation, Region, among others)

Address capture

- New entry of contacts and Contact persons
- Use of the Outlook functionality and subsequent takeover in piaX

Address import

- Use of the Outlook functionality and subsequent takeover in piaX

Contact and contact search

- Comprehensive search, sort, and grouping Filter functionality
- Search across multiple fields

Consistency check

- Duplicate check during synchronization
- Definition and verification of mandatory fields and Formats

Categorization

- Automatic assignment of categories to Outlook contacts and contact persons

Informationmanagement

Dashboard

- Detailed overview of the contact
  - Active sales projects
  - Last receipts
  - Recent sales promotions
  - Sales
  - Part statistics
- Link to the details
- Adaptation of the list views

Extended customer information

- Customer information such as sales figures, Receipt data and payment values
- Information from the proALPHA project management and the service module (Call information)
- Support „free fields"
- Comprehensive parts statistics per customer

Sales projects

- Current sales project status
- Comprehensive search, sort and Filter functionality

Sales activities

- Creation and editing of Sales activities
- Categorization of activities
- Automatic creation of Outlook tasks or calendar entries from sales campaigns or resubmission

Function description

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CRM standard and modules*

Part Statistics

- Total statistics for all customers
- Pivot evaluation of the parts, parts groups possible
- Comprehensive evaluation options for part quantities / prices per customer Parts or parts group
- Overall view of parts statistics for flexible Evaluations of the parts over all piaX Contacts away

Parts catalog including inventory information

- Graduated discounts including customer sharing group
- Article catalog
- Price lists in article catalog in various currencies
- Individual layout

Call processing

- Call recording with all details
- Adding machining steps and positions

Item lists

- A simple and clear processing of characteristics of the piaX contacts and piaX contact
- Cross-contact feature lists

Tasks

- Link with sales activities (current tasks or follow-ups)
- Forwarding of tasks (open Activities)
- Task management

Calendar

- Upcoming events
- Link with sales activities

Overviews piaX lists

- Overview lists of all contacts, Contact person, sales projects
- Sales activities, sales documents and Material characteristics
- Comprehensive search, sort, and grouping Filter functionality

Workflow

- Generation of proALPHA workflow Activities by email and Activity monitor

People business

- Extension of the piaX contact and Contact person mask for the function „Add" for participants

Access management

User sensitive

- Company-controlled access to business addresses, definable per user
- Full flexibility for filter criteria

Privatized

- Separation of private and business Addresses

Multi-client capability

Function description
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CRM standard and modules*

Sales management

Offer- and order management

Assigned offers

- Availability in proALPHA
- Call from sales project or offer
- Automatic adjustment of the status of the offer

Tag and keywording

- Tags or Assignment of tags to sales campaigns or activities
- Display of the tags in the main list
- Filtering by tags

Offer status

- Individual configuration
- Reminder function for offers

Multi-level sales

- Multiple contacts and contacts assign to a sales project

Receipt information

- Overview of offers, orders, Delivery notes, invoices, etc. per contact and contact across the board
- Document information with item information (Part, quantity, price)
- Individual linking of documents To each other

Integration of the piaX module Property

Serial numbers

- Creation of an overview of marked Products with serial numbers at the customer

Field service support

Route planning and area search

- Mini-map on the dashboard, with contact, contact person, sales campaign / activity, object
- Map window with POVs
- Area search
- Route calculation
- Favorites

Appointment and visit planning

- Conversion of sales activities into Outlook dates

Appointment and visit planning

- Conversion of sales activities into Outlook dates
- Conversion of outlook dates into sales activities
- Recording of travel expenses directly from MS Outlook appointments

Tasks

- Conversion of sales activities into Outlook tasks

Visit report recording

- Direct assignment to related sales activities and dates

Function description
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CRM standard and modules*

Visit reporting

- Overview of current offers, open invoices, Sales volume, ...
- Including search, sort and filter functionality

Substitute assignment

- Assignment of representatives with suitable roles

Competition data

- Collection and maintenance of data on competitors

Offer values

- Display of weighted or unweighted offer values

- Editing or new entry of the offer values per sales project based on parts groups
- Weighting according to the recorded probability of completion of the sales project

Forecast

- Display of all offer values per sales project on the contact
- Overall view and graphic evaluation of all weighted / unweighted offer values across all Contacts per parts group / contact / sales project

Overarching software functions

Search and selection functions

- In all views: contacts, contact persons, Sales projects, Sales activities, sales documents, characteristics
- Filter by any column
- Comprehensive search across all columns

Rules and Formatting

- Colored highlighting of information through Conditional formatting in the list views
- Individual adjustments possible

Sales project management

- Clear presentation of all for a project related activities such as appointments, meetings, Tasks, phone notes, overall status of a sales project
- Classification and evaluation of sales projects

Printing and list export

- Configurable pressure from contact and sales information
- Lists can be exported for further processing are taking into account individual piaX users settings

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

List view favorites

- piaX lists can be individually selected as favorites to be saved
- Favorites contain the selected column arrangement, formatting and filtering

multilingualism

- Multilingual configurable interface (piaX menu: German, English)
- International address formats (use of pre/postfix fields)

synchronization management

- Notification of synchronization conflicts
- Notification in the event of a negative system check
- Possibility of soft manual synchronization stops

input support

- Dynamic search fields when collecting data

piaX module - document management

document management

- Display of documents from the proALPHA DMS
- Display by document type
- Documents on contacts/customers, sales projects, sales activities, sales documents, projects and calls
- Display and search using keywords
- Synchronization can be set for each document type according to the period and/or document size

Capture of documents

- Create new documents
- Selection of the document type
- Automatic keyword assignment
- Observance of the permitted file types and sizes configured in proALPHA
- Offline acquisition
- E-mail archiving (automatic pre-selection of contact, contact person, campaign type and transfer to a sales campaign)
- Sending and archiving of e-mails directly from a sales campaign
- Parts group/ contact/ sales project