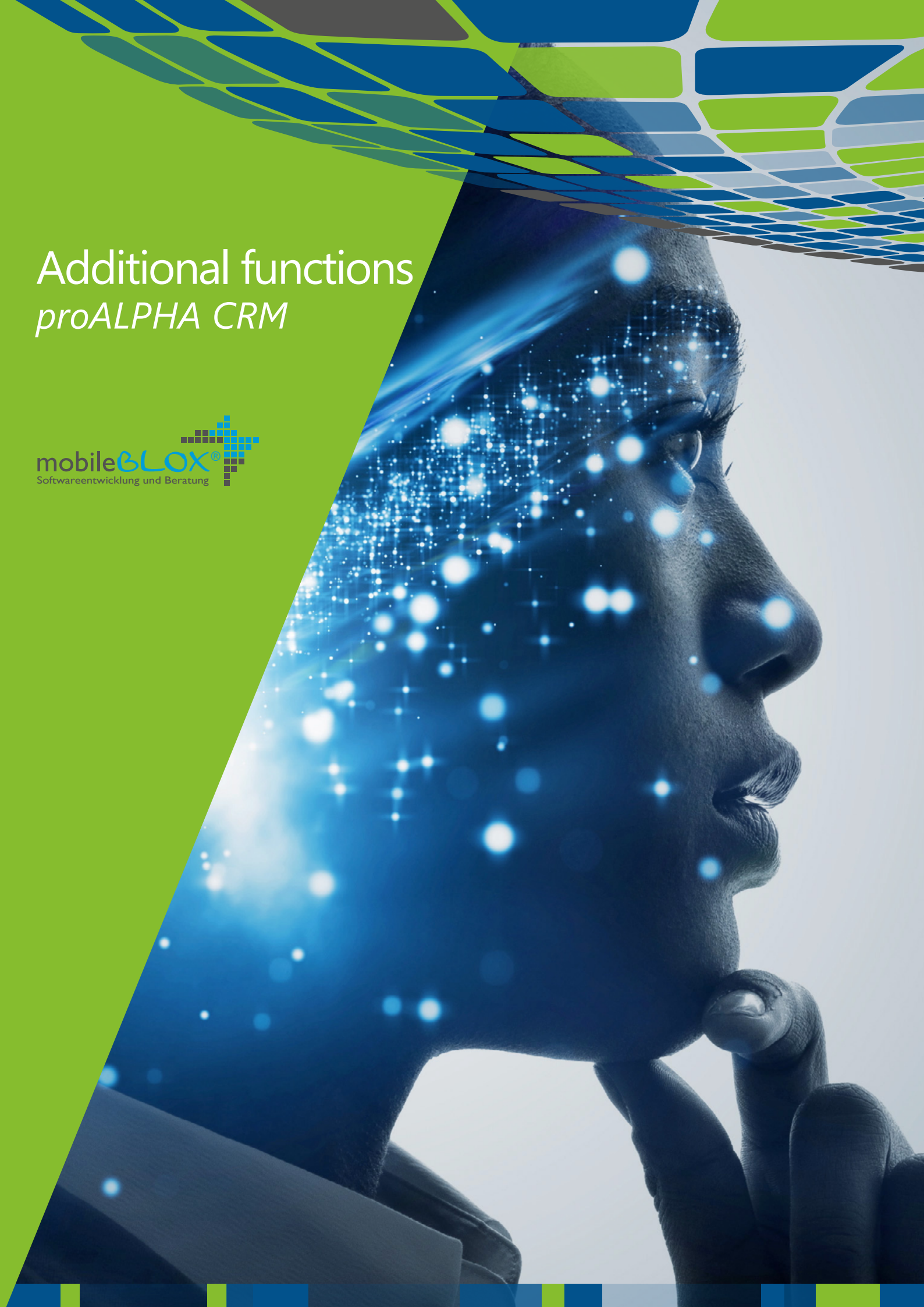


Additional functions

proALPHA CRM





Additional functions

proALPHA CRM

Do you need more functions in CRM than the classic proALPHA user? You are at the right place here. We have added useful features to proALPHA-CRM that make your daily work easier.

You also have the option of maintaining all sales-related information in proALPHA and linking it to your existing data.

Our proALPHA extensions can also be purchased independently of our mobile solution piaX.

CRM becomes xRM

Do you also want to document your visits, agreements, and notes to your suppliers in purchasing? With the xRM extension you connect suppliers, competitors and representatives with prospects and have thus the possibility to document all your activities at the supplier, the suppliers as participants to assign to sales projects or objects or relationships between suppliers, customers, and map contacts.

This creates more transparency in communication and allows you to map relationships across the board and see at the push of a button which supplier is involved in which projects.

Functions

- Establishment of a contact with each supplier, competitor, or agent
- A contact can be a customer and supplier at the same time
- Establishment of contact with supplier, competitor, or agent

Additional functions proALPHA CRM



CRM becomes xRM

Kontakte

Adresse Ctrl+F1
Kunde Ctrl+F2
Ansprechpartner Ctrl+F3
Vertreter Ctrl+F4
beteiligt an
Umsatzsteuer-Identifikationsnummern Ctrl+F5
Teilnehmer von Ctrl+F6
Vertriebsprojekte Ctrl+F7
Vertriebsaktionen Kontakt Ctrl+F10
Branche Kontakt Ctrl+F12
Aktivitäten Ctrl+Shift+F1
Freie Felder Ctrl+Shift+F2
Lieferanten-Zuordnung Ctrl+Shift+F3
Wettbewerber-Zuordnung Ctrl+Shift+F4
Vertreter-Zuordnung Ctrl+Shift+F5
Zustände Ctrl+FB
Notizen Ctrl+Shift+F6
Texte (Kontakt - Bemerkungen) Ctrl+F9
Merkmale Ctrl+F11

Ansicht Extras Stamm Info

Kunde: 200000 100000
Name: StromMax e.G.
Suchbegriff: StromMax e.G.
Selektion: Mainz
Sachbearbeiter: Ackermann
Straße: Raiffeisenstraße 1
Ort: DE 55124 Mainz
Telefon: +49/6131/9721-22
Telefax: +49/6131/9721-99

Parameter | Bankverbindung | Bemerkung | Freie Felder

Gruppe: 10 Kontakte Inland Sprache: Deutsch
Branche: ED Engineering Dienstleistung Währung: 0 EUR
Region: EDE Deutschland
Preisliste: DEF Deutschland Fact
Kontakt: 51000 Handelskv. + Großh. (ohne Han
Rabattgruppe: 10 Fachhändler
Kategorie: K Kunde
SteuerNr:
Besuch: 21.03.2022
 Rabatt sichtbar
 Fracht skontofähig

Lieferanten

Hersteller: 800004
Name: StromMax e.G.
Suchbegriff: StromMax e.G.
Selektion: Mainz
Straße: Raiffeisenstraße 1
Ort: DE 55124 Mainz
Telefon: +49/6131/9721-22
Kontakt: 200000

Sachbearbeiter: black

Basisdaten | Parameter | Bankverbindung | Info

Verteilerguppe: 10 inländische Lieferanten Sprache: Deutsch
Branche: ED Engineering Dienstleistung Währung: 0 EUR
ABC-Klasse:
Betriebskalender: 0 Basiskalender - übergf. Feiert
Kundensnummer:
inkl SteuerNr:
Kontakt: 200000

Kontakte

Kontakt/Kunde: 200000 100000
Name: StromMax e.G.
Suchbegriff: StromMax e.G.
Selektion: Mainz
Straße: Raiffeisenstraße 1
Telefon: +49/6131/9721-22
Sachbearbeiter: Ackermann

Aktivitäten Kontakt 200000 nur nicht erledigt

Akt	Bez	AktTyp	Betreff	Bez	Ergebnstyp	Datum	UZ	Name AP
223	Notiz		Besprechung Ausschreibung	teilgenommen		14.08.2020	11:28	
1138	Akquise		Bestellung Angebot	nicht teilgenomr		17.02.2022	10:33	Herr Dipl.-Ing. Dipl.-Ing. I
529	Akquise		Besuch			25.03.2021	08:50	Herr Faniel Rothe
						09.11.2021	12:00	Herr Helmut Schmidt
						01.03.2022	12:00	Herr Benno Domeieri
						29.07.2022	14:07	
						02.07.2020	13:04	Herr Tom Brady
						06.01.2021	10:00	
						30.06.2020	10:00	Herr Benno Domeieri
						13.08.2020	13:33	Herr Benno Domeieri
						09.12.2020	08:00	Frank Steiner
						10.07.2021	09:00	StromMax e.G.
						29.04.2022	16:29	
						13.09.2021	00:00	StromMax e.G.

Aktivität Kontakt 200000

Aktivität: 529
Datum: 25.03.2021
Aktionstyp: 6 Akquise
Ergebnistyp: 0
Betreff: Besuch
Ansprechpartner: Herr Faniel Rothe
Sachbearbeiter: Trautmann
 erledigt
 dringend
 vertriebsrelevant
 einkaufsrelevant

Bemerkung | Wiedervorlage | Besuchstermin | Änderungen | Text | Tags

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy eimod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptus. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy eimod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptus. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.

Additional functions proALPHA CRM



Activities instead of sales campaigns

The sales action has been upgraded and is now called an activity. The basic features are the same, but there are more to come!

Activities are significantly more flexible than sales campaigns. In this way, contacts from assign to other prospects, the activities can be assigned to several sales projects, objects/plans at the same time and additional keywords can be stored via tags for efficient evaluation. Due to the direct assignment to the contact, a sales project is no longer mandatory.

Simple remarks are not enough for you? Want more creativity in your activity notes? Use the text block for visit reports or acquisition! Thanks to RTF support, you can also format your texts there and even insert text modules you have created yourself with just a few clicks

Do you use the workflows in proALPHA? Then the workflow integration of the activities will support you in your daily work.

■ ■ *Functions*

- Assignment of an activity to a contact, sales project, object, intention, project, or project process
- Contact persons and participants of different contacts
- Text block with RTF formatting and text modules
- Additional keywords (tags) for better categorization, segmentation, and search of activities
- Creation of activities from marketing campaigns
- Workflow integration

Additional functions proALPHA CRM



Activities instead of sales campaigns

Vertriebsprojekte Kontakt 200000

Datei Funktion Extras Stamm Info

Vertriebsaktionen Ctrl+F1
 Ansprechpartner Ctrl+F2
 Wettbewerb Ctrl+F3
 Angebotswerte Ctrl+F4
 Angebote Ctrl+F5
 Vorhaben Ctrl+F6
 Beteiligte
Aktivitäten Ctrl+F7
 Vertriebsprojekt-Historie Ctrl+F8

heid	Sachbearb	VProStat	AbWa	Vtr	Anfrage
	Sedlmayr	Lead	30%	3	Neuanlage VP Prüfung
	Ackermann	Opportunity	30%	1	Neubau
	2021Ackermann	Signed	80%	1	Projekt
	Brown	Opportunity	10%	3	Entwässerung
	2021Billstein	ohne	0%	1	In-house exhibition
	2020Bauer	Termin	33%	1	SM/HW 001

Vertriebsprojekt 9 10.03.2022 Do
 VProGruppe ID Innendienst / Verwaltung
 Entscheidung
 VProStat Opportu
 AbschlWahrscheinl 10%
 Vertreter 3 Roman
 Anfrage Entwässerung
 Vorhabennummer 0

Selektion Entwässerung
 archiviert
 Sachbearbeiter Brown Charles Brown
 Wiedervorlage
 Projekt
 Rollenliste

Aktivitäten Kontakt 200000 VPro 9

Datei Funktion Stamm Info

nur nicht erledigt

Akt	Bez	AktTyp	Betreff	Bez	ErgTyp	Datum	UZ	Name AP
1175	E-Mail	Anfrage				13.01.2022	10:58	Herr Martin Hennes
1172	E-Mail	Anfrage entwässerungsanlage				13.01.2022	10:58	Herr Martin Hennes
1173	Notiz	Angebot nachtelefonieren				10.03.2022	11:02	
1169	Präsentation	Lead Qualifizierung	nicht teilgenomr			20.03.2022	11:00	Herr Dirk Meister
1171	Akquise	Präsentation piaX				09.03.2022	12:00	Frau Christa Dobler
1178	Besuch	Service Visit				21.03.2022	14:41	Herr Martin Hennes
1170	Akquise	vor Ort Besuch				11.03.2022	09:00	Herr Martin Hennes

Aktivität Kontakt 200000 VPro 50

Datei Funktion Ansicht Extras Stamm Info

Aktivität 311 Sachbearbeiter Bauer

Datum 15.10.2020

Aktionstyp 0 Notiz erledigt

Ergebnistyp 0 dringend

Betreff <Neu> vertriebsrelevant

Ansprechpartner einkaufsrelevant

Bemerkung | Wiedervorlage | Besuchstermin | Änderungen | Text | **Tags**

Assign Tag	Bezeichnung
<input type="checkbox"/> Admin-Schulung	Admin-Schulung
<input type="checkbox"/> Angebot	Angebot
<input type="checkbox"/> Anwender-Schulung	Anwender-Schulung
<input type="checkbox"/> Auftragsbestätigung	Auftragsbestätigung
<input type="checkbox"/> Bestandserweiterung	Bestandserweiterung
<input type="checkbox"/> Bestätigung	Bestätigung
<input type="checkbox"/> Bestellung	Bestellung
<input type="checkbox"/> DSGVO	DSGVO
<input type="checkbox"/> Externes Meeting	Externes Meeting

Additional functions proALPHA CRM



Relationship networks

With the relationship networks it is possible to map connections between prospects, prospects, and contacts or between contacts. The relationships are defined by roles. So, assignments to organizations can be mapped in the same way as internal company structures. Make the connections visible and use them in your everyday sales. That's the only way you can target your market.

In addition, it is possible to map the historical development of a contact. i.e., you see in which companies the contact was previously employed.

The screenshot displays the CRM interface for a customer named 'StromMax e.G.'. The main window shows customer details such as name, address (Raffensteinstraße 1, DE 55124 Mainz), and contact information. A secondary window shows the 'zugeordnete Kontakte' (assigned contacts) table:

Anf	Bezeichnung	Kontakt Name	Von	Bis
51	Berater	200002 Voltaplan AG	26.11.2020	
9999	Tochterkonzern	200001 Energie LE GmbH	01.07.2005	
9999	Berater	200005 Rhodos GmbH	01.01.2018	
9999	Berater	200010 Stern Spirit Kindergarten	17.08.2021	
9999	Berater	200004 Tempo AG	18.08.2021	
9999	Eigentum	200013 Viper AG	17.01.2022	
9999	Eigentümer	901 Franz GmbH	01.02.2022	
9999	Standort	901 Franz GmbH	09.02.2022	
9999	Distributor	200072 proALPHA Software AG	09.02.2022	

A third window shows the 'Anspruchspartner' (responsible contact) details for contact 200000, including role (BER - wird beraten von), validity period (16.06.2022 to 31.07.2021), and contact history.

The 'Anspruchspartner' window shows details for Herr Udo Wertheim, including contact information (Wertheim, Leipzig Mitte) and a history of assignments. The 'Anspruchspartner-Historie' table is as follows:

Anf	Von	Bis	Name	Kontakt Name	Ort
1	18.06.2021	31.07.2021	Herr Udo Wertheim	200000 StromMax e.G.	Mainz
5	04.04.2018	31.05.2020	Herr Udo Wertheim	200007 Fichter+Prenzel GmbH	Leipzig Mitte
6	06.06.2016	31.03.2018	Herr Udo Wertheim	200008 Landratsamt Landkreis Leipzig	Borna
7	01.04.2010	05.06.2016	Herr Udo Wertheim	390003 LEAG - Lausitz Energie	Cottbus

Functions

- Relationships between contact and contact
- Relationships between contact and contact person
- Relationships between contacts
- Assignment of a role, a validity period and a remark
- Contact person history with contact change

Additional functions proALPHA CRM



Involved

Various external companies or partners are involved in your sales process? Add this just add. In this way, you can keep track of who was involved in what and when. With those involved, assignments of sales projects, plans, objects, serial numbers, and service objects for prospects, contacts, or clerks. Included can each have a role (e.g., project manager, wholesaler), a period, an evaluation and a comment be deposited. Due to the time allocation, changes in the participants, e.g., in a project easily possible. In the case of service objects and serial numbers, for example, the owner, the operator, or the technical contact can be stored.

Conversely, the prospects, contacts or clerk can then show where they are each are involved. With those involved, you create significantly more transparency and can quickly and easily maintain and analyse your relationship networks in a structured way

■ ■ *Functions*

- Assignment of involved contacts, contact persons or clerks, sales projects, plans, objects, serial numbers and service objects
- Roles, timing, rating, and comment
- Display of the participation in the prospect, contact and clerk
- Use of predefined role lists

Additional functions proALPHA CRM



Kontakte

Ansicht Extras Stamm Info

Adresse Ctrl+F1

Kunde Ctrl+F2

Ansprechpartner Ctrl+F3

Vertreter Ctrl+F4

beteiligt an

- Objekten
- Vorhaben
- Vertriebsprojekten
- Serviceobjekten
- Seriennummern
- Rollenlisten
- Ansprechpartner
- Kontakte

Umsatzsteuer-Identifikationsnummern Ctrl+F5

Teilnehmer von Ctrl+F6

Vertriebsprojekte Ctrl+F7

Vertriebsaktionen Kontakt Ctrl+F10

Branche Kontakt Ctrl+F12

Aktivitäten Ctrl+Shift+F1

Freie Felder Ctrl+Shift+F2

Lieferanten-Zuordnung Ctrl+Shift+F3

Wettbewerber-Zuordnung Ctrl+Shift+F4

Vertreter-Zuordnung Ctrl+Shift+F5

Zustände Ctrl+F8

Notizen Ctrl+Shift+F6

Texte (Kontakt - Bemerkungen) Ctrl+F9

Merkmale

Kunde: 200000 | 100000

Name: StromMax e.G.

Suchbegriff: StromMax e.G.

Selektion: Mainz

Sachbearbeiter: Ackermann

Telefon: +49/6131/9721-22

Telefax: +49/6131/9721-99

Sprache: Deutsch

Währung: 0 EUR

Preisliste: DEF | Deutschland FacI

Rabattgruppe: 10 | Fachhändler

Rabatt sichtbar

Fracht skontofähig

Kunden

Ansicht Extras Stamm Info

Kunde/Kontakte: 100000 | 200000

Name: StromMax e.G.

Suchbegriff: StromMax e.G.

Selektion: Mainz

Sachbearbeiter: Ackermann

Telefon: +49/6131/9721-22

Strasse: Raffelsteinstraße 1

Ort: DE 55124 Mainz

Vertriebsprojekte Kontakt 200000 (Kunde 100000)

Ansicht Extras Stamm Info

gültig	ProjVp	Bez Rol	RoKI	Name AP	Name	Ort	Tel AP
	39019	Projektleiter	0	Herr Martin Hennies	Architekturbüro Andrea Lüpken	Hamburg	06131/9721-
	39020	Projektleiter	0	Herr Martin Hennies	Rauer OHG	Trier	06131/9721-
	200042	Projektleiter	0	Herr Martin Hennies	Firma Köstlichkeiten GmbH	Leipzig	06131/9721-
					Börsen	Börsen	06131/9721-
					Knochen	Knochen	06131/9721-
					Leipzig	Leipzig	0621/82048
					Mainz	Mainz	0621/82048
					Saarbrücken	Saarbrücken	06131/9721-
					Markranstäd	Markranstäd	06131/9721-

Vertriebsprojekt Beteiligter

Ansicht Extras Stamm

Kontakt ProjVp: 300009 | Rauer OHG

Kontakt: 200000 | StromMax e.G.

Ansprechr: 2 | Herr Martin Hennies

Sachbearbeiter:

Rollenklasse: 0

Bezeichnung:

Rolle ändern

Zuordnung: Ansprechpartner

Kontakt: 200000 | StromMax e.G.

Sachbearbeiter:

Rolle: PL (Projektleiter)

Rollenklasse: 0

Gültig von: 21.07.2020 | Dt

Gültig bis:

Anzeigefolge: 9999

Seriennummern

Ansicht Extras Stamm Info

Seriennummer: BA-000001

SNR Art: BA

Bezeichnung: FILTER

Seriennummertyp: 100

Teil: 100000

Sachbearbeiter: Ackermann | Jürgen Ackermann

Wiedervorlage: 30.09.2020 | Mi

Basissdaten | Adresse | Service

Verteilerguppe: STD | Standard

SNR Status: im Einsatz

Bemerkung: Test Test Test

Inbetriebnahme: 01.09.2020 | Di

Garanzzeit: 730 | Tage

Garantie ab: 01.09.2020 | Di

Garantie bis: 01.09.2022 | Do

Baumonat: 01

Baujahr: 2005

Prüfzeugnis: BA04212

Neue Seriennummer:

Austauschdatum:

Herstellungsort: Weierbach

Version: 2005-2

Kunde: 100000 | StromMax e.G.

Zuordnung von Beteiligten zu Seriennummer BA / BA-000001

Ansicht Extras Stamm

gültig

gültig	rol	Bez Rol	Kunde	Kontakt Name	Name AP	Von	Bis	RoKI	arch	Teil AP	Telef
	1	E	Eigentümer	100002	200002 Voltplan AG	Herr Norbert Schönherr	06.10.2020	0	nein	0511/7896889	+49/1
	2	BTR	Betreiber	150000	250000 Gustav Birki AG	Herr Gustav Locher	04.06.2019	0	nein	034804/8906-0	+51/

Kontakt: 200002 | Voltplan AG

Ansprechr: 1 | Herr Norbert Schönherr

Gültig von: 06.10.2020

Gültig bis:

Sachbearbeiter:

Rollenklasse: 0

Anzeigefolge: 1 archiviert

Bezeichnung:

Additional functions proALPHA CRM



Improved offer matching

With the improved offer association, the status update between associated offers (on the sales project) and the actual offer is automated. This is how it can be set Offer is automatically archived when 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 becomes. This saves time that you can better invest in creating new offers.

With the additional comments, you can store your latest information directly in the offer assignment. This means that you and your team are up to date more quickly.

■ ■ Functions

- Offer assignment can be opened and edited directly from the offer
- Automatic status update when the offer is accepted in the order
- Automatic archiving of the offer when the status changes
- Extension of the assignment to comment and resubmission

The screenshot displays the proALPHA CRM interface with several windows open:

- Angebot (Offer):** Shows details for a customer (Kunde/Kontakt: 100000, 200000), name (StromMax e.G.), and address (Raiffeisenstraße 1, DE 55124 Mainz). It includes fields for Belegnummer (10102138), Belegdatum (30.05.2022), and Sachbearbeiter (Harald Bauer).
- Angebote Kontakt 200000 VPro 8:** A table listing offers with columns for 'guilt', 'Ergebnis Angebot', 'Kunde', 'BelegNr', 'Belegdatum', 'Sachbearb', 'Anfrage', and 'Kontakt'. The table shows various offer statuses like 'meine verloren', 'ja offen', and 'ja offen'.
- Angebote Kontakt 10101451 VPro 5:** Shows details for a specific offer with 'Ergebnis Angebot' set to 'offen' and 'Anfrage' set to 'Projekt'. A comment box contains the text: 'Projekt wurde verschoben in 3 Monaten nochmal KJ'.
- Vertriebsprojekte Kontakt 200001:** A table listing sales projects with columns for 'archiviert', 'VPro', 'Projekt', 'Beginn', 'Entscheid', 'Sachbearb', 'VProStat', 'Ab/Wa', and 'Vtr Anfrage'. The table lists projects like '5 Projekt S; AD', '6 Projekt M AD', and '51 Hausmei: AD'.
- Angebote Kontakt 200001 VPro 5:** Shows details for another offer with 'Ergebnis Angebot' set to 'offen' and 'Anfrage' set to 'Anfrage 1'. A comment box contains the text: 'Projekt wurde verschoben in 3 Monaten nochmal KJ'.

Additional functions proALPHA CRM



Newsletter connection

Do you know the problem - you create address lists for mailing campaigns in proALPHA, export them, send the mailing and then the unsubscribes or bounces must be sent back to proALPHA be entered. Exactly to make this work easier for you, we have an automatic comparison of the addressee developed with the newsletter provider. In this way, the addressees can be transmitted at the push of a button and the cancellations or bounces can be written back to proALPHA. Stay like that Your data is always up to date, and you have less routine work to do.

Functions

- Synchronization of the addressees of a marketing campaign with the newsletter provider
- Writing back cancellations and bounces to the contact (Robinson list) and to the characteristics of the contact person
- Currently supported providers: Inxmail (www.inxmail.de), Sendinblue/Newsletter2go (www.sendinblue.de)

The screenshot displays four windows from the proALPHA CRM interface:

- Marketingaktion:** A menu on the left includes 'Newsletter Adressaten übertragen' (highlighted in blue). The main area shows a table with columns for 'Betreff', 'AnlDatum', and 'Attachment'.
- Adressaten Marketingaktion 527/13.10.2021:** A table listing contacts with columns for 'Kontakt', 'Kontaktklasse', 'VPro Name 1', 'Selektion', and 'Ansprechpartner'.
- Ansprechpartner:** A detailed view for 'Herr Thomas Müller' showing 'Basisdaten' (Abteilung, Funktion, Selektionscode, Anzeigefolge, E-Mail, Gültig von/bis) and 'Merkmale' (Selektion, Telefon, Telefax, Handy, Person-ID).
- Merkmale [8]:** A table showing newsletter subscription status with columns for 'AzgF Merk', 'Bezeichnung', 'Ausprägung', 'Einheit', and 'Bezeichnung 1'. The '0 NEWS Newsletter' row is highlighted in blue.

System Requirements

These CRM extensions stand for the following proALPHA main versions available:

- 6.1 ab 6.1e,
- 6.2 ab 6.2d,
- 7.1 ab 7.1d,
- 7.2 ab 7.2d,
- 8.0 ab 8.2201,
- 9.0 ab 9.0.3
- proALPHA Ray is currently not released

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.

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Contact

For further information please contact your proALPHA partner or on our website:

mobileBlox GmbH

Salomonstraße 21
04103 Leipzig



+49 341 355 87 170
vertrieb@mobileblox.de
www.mobileblox.de

