

CRM Fact Sheet

Last Modified on 01/07/2025 3:15 pm CST

Advantages

- Manage Customer communications.
- Monitor Customer activity.
- Identify and segment Customer opportunities.
- Maximize each Customer's sales potential.
- Save time and money with electronic delivery of transaction-related documents.

Features

- CRM Communication Journal
 - Provide a centralized database of communications between a Customer and the company.
 - Add entries manually from a desktop or Mobile Sales.
 - Automatically record entries from Outlook via CRM Add-In.
 - View the full journal or filter to view only the User logged in for a specified *Date Created* range.
 - Select additional filters, such as *Communication Type*, *Owner* designated on the entry, or *Follow Up Date*.
- Customer Activity View
 - Select the type of transaction to display for the selected Customers.
 - Sort data with varied filters depending on the type of transaction selected.
 - Easily monitor activity by transaction type for one or more customers at a time.
- Electronic document delivery
 - Deliver documents electronically including Customer Statements, Invoices, Bookings, Delivery Tickets, Blend Tickets, Grain Settlement Documents, and other document types.
 - Stage delivery of emails or directly send emails at the time of the activity.
 - Filter by *Document Type* and *Date Created* range.
 - Tag all or specific documents for delivery.
 - Maintain a historical log of documents.
- Customer GAP Analysis report
 - Provide a clear picture of a Customer's activity with the company across all lines of business.
 - Identify selling opportunities and gaps within the selected Customers' portfolios based on information gathered from AR Invoices and Grain activity.
 - Filter information by selecting *Optional Invoice Report* and *Grain Report Criteria*.
 - Filter results by Customer Attribute and Business Influence type.
 - Export results to a PDF, Excel, or Text file.

Preferences

- Customize email by indicating preferences.
- Add user-defined Communication Types.
- Document Type, delivery method, and email address per document type and Customer.

Outlook Add-In

- Optionally set up email addresses for multiple customers simultaneously.
- Automatically create CRM Communication Journal entries when sending and receiving emails.