CRM Fact Sheet

Using CRM (Customer Relationship Management) has its Advantages

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

CRM Features to Improve Business Work Flow

- 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 for 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 selecting preferences
- Add user-defined Communication Types
- Document Type, delivery method, and email address per document type and customer

Agvance CRM Outlook Add-In

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