Customers, sales & CRM

Sales and receivables are the lifeblood of any organisation and the effective management of these is essential to all growing businesses. The Accentis Enterprise Customers, Sales and CRM module provides complete control over your entire sales process from the initial enquiry through to the printing of statements and ongoing customer relationship management.

Our strong customer record management capabilities are complemented by a sophisticated real-time validation regime that constantly monitors a customer's credit status at every step of the sales process. An exceptional pricing facility ensures ease, consistency and accuracy of quoting, ordering and invoicing, while built-in support for quantity-based pricing, rebates, settlement discounts, progress claims and retentions brings true flexibility to sales pricing management.

Real-time integration into inventory, job costing and the general ledger ensures the results of all sales processes are immediately visible to other modules. Extraordinary reporting capabilities allow you to perform current or unlimited historical sales analyses over any combination of data records you choose and, with scores of customisable reports available, you can keep your finger on the pulse at all times.

Functional capabilities at a glance...

- Customer & prospects management (unlimited)
- Contacts & CRM management (unlimited)
- Customer types management (unlimited)
- Pricing, rebate and discount management (unlimited)
- Campaign management (unlimited)
- Freight company management (unlimited)
- Sales enquiry
- Sales quotation

- Sales order
- Hire on and hire off
- Deliveries, returns, repairs and RGAs
- Sales invoice & credits
- Point of sale & bar coding
- Receipting and depositing
- Statements
- Recurring invoices

The Accentis Enterprise Customers, sales and CRM module has a host of innovative features that will save time and money, reduce errors and mistakes and make the most of the resources you have. Shown below is a small selection of the many features available.

Warnings and validation throughout the sales process ensure tight credit control and a high level of data integrity. Warnings such as *customer over credit terms or limit*, *stop credit*, *partial/early shipment validation*, *duplicate order numbers*, *stock shortages* and even *cost/sell price margin violations* are just a few of the many checks and balances that Accentis Enterprise can carry out.

Multiple and partial dispatches are fully supported within Accentis Enterprise with a drill-down detailed back-order report that shows you everything you need to know about what is remaining, when it is required, what has already been delivered and a scheduled date of delivery.

Advertising campaigns are supported in Accentis Enterprise and you can link each and every sales quote, order or invoice to a particular campaign. This is an essential part of campaign analysis to determine how much money has been generated from specific campaigns such as yellow pages, internet or magazine ads.

Comprehensive pricing, discounting and rebates ensure that customers are getting the right price every time they order, even if they have time-limited special pricing or are part of a buying group. In a well organised Accentis Enterprise system, anyone can quote prices for a customer without having to remember their special pricing arrangements.

An **unlimited number of years of historical data** gives you the power to perform complete historical analyses of customer buying trends, sale price movements, product popularity or payment history.

Unlimited date-stamped memos for each customer allow you to record any event, transaction or comment against a customer's file for future reference, including reasons for late payment, details of phone calls or correspondence, reasons why a customer was placed on stop credit and more. When staff members leave, you will have a greater assurance that customer relationship information will remain with you.

A **sales quote won/lost status** allows you to do valuable post-mortem analysis on all of your sales quotations to see how many have been lost, when, who they were lost to and by how much. It also allows you to forecast and track sales opportunities using pipeline stages and probability factors, to generate instant reports and filter by closing date, sales stage, probability, status and more.

Electronic document linking is supported throughout. Any document on your system can be linked to one or more customers and then quickly viewed or printed as required, including credit applications and directors' guarantees, contracts and agreements, and even email correspondence.

Invoices or statements can be re-printed at any time for any customer. There is no limitation on how far back you can print statements or invoices and you can easily re-generate a statement run for any arbitrary period.

User-defined pop-up messages can warn and alert users whenever certain operations are performed for specified customers. For example, on a sales order for a particular customer, you could warn sales staff not to negotiate on price, or store staff can be alerted when picking stock that a customer requires all goods to be double-wrapped in bubble-wrap. The possibilities this opens up for customer relationship management are endless.

User-definable customer types allow you to group and sub-group customers as required with no restrictions on the number of types that you can define, which is perfect for powerful sales and marketing analysis.

An **unlimited number of delivery and invoice addresses** can be configured for each customer, each with its own name and shipping details, reducing data entry errors and giving great CRM feedback.

An **unlimited number of contacts** may be linked to one or more customers or prospects. When prospects are converted to customers, all contact linking is retained.

Customers can be assigned a preferred output method for invoices and statements (mail, email or fax). A single-click procedure can then perform the appropriate function for a bulk list of invoices or statements without any further intervention, saving money on postage and handling where a preference for fax or email has been selected.

Automated invoice allocation on receipts saves time and effort when receipting. Simply enter the customer and the amount received and Accentis Enterprise will do the rest and automatically allocate outstanding invoices oldest-first. Of course, manual selection and allocation is also available.

See our web site for a full list of the many features available.