Customer Relationship Management (CRM)

CASYMIR CRM is an efficient support to marketing, distribution and sales departments. With CASYMIR CRM you do not only administrate transactions, you can also evaluate them according to different criteria. Naturally, this module also supports the planning and realisation of marketing events.

CRM offers the following functions:
- Administration of business transactions, site visits, phone memos
- Complaints
- Complaint procedures
- Events
- Import of address data
- Criterion-based mailings
- Bulk e-mail sending
- Free attribution of company data
- Sales processes

Field of application

Systematic logging of business transaction (potential customers, customers, suppliers, forwarders, banks, contract partners etc.) independently from the persons who created them. Collection of address data for events.

Processing of data for information mailings via different channels.

The module can be used in all economic sectors.

Functionality Data basis

The basis of all the information available in the CRM system results from the cross-linkage of different modules within CASYMIR, which host the relevant details. This linkage is achieved through freely configurable attributes which can be assigned to the different incidents (customers, suppliers, potential customers etc.).

Through the interaction of the CRM modules with other relevant CASYMIR modules an incident may be registered, added or edited from different contexts.
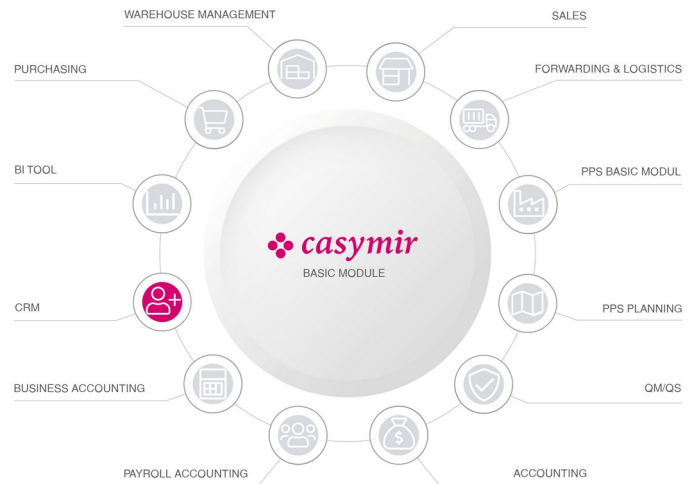
Address administration

CRM uses the address administration from the CASYMIR Master Data Module.

Company and company employee administration

The CRM module includes an autonomous company master and employee administration. Companies can be classified in several ways autonomously:
- several sectors, the sector master can be defined freely
- several spheres of interest, the interest sphere master can be defined freely
- one company class, the company class master can be defined freely.
- one representative, the representative master can be defined freely.
- A company can be linked to any number of addresses:
- one contact address
- any number of delivery addresses, one of which as a default
- any number of invoice addresses, one of which as a default
- any number of employee addresses
- In connection with a company, any number of (third-party) employees can be registered in the system. Company employees can receive multiple classifications, e.g. according to:
- function
- person codes, a freely definable classification

Attribution

attributes are filed in the system as master data, the attribute master is freely definable and can be extended at any time. Apart from unstructured, free information (free text), attributes may also contain controlled data, e.g. a selection of pre-defined options, values, date information, links within the system…

All attribute values have a temporal validity. This allows you to keep a record of their chronological course within the system. Thanks to the attribution, you are never limited by pre-defined data structures; you can always extend the data model according to your needs.

Business transactions

Within the CRM Modules, the business transaction administration is a powerful instrument for documenting transactions and tracing a series of specific actions. The transaction administration supports a journal in which incidents involving companies and their employees are logged.

A text (from a short memo to a complete report) can be registered for each date). Follow-ups can be assigned to specific employees at specific dates. In the event of sickness of vacation, all the dates can be forwarded to a substitute. The registered text may also be copied to text processing programs and sent as post or e-mail. All registered company and personnel data can be catalogued and displayed or printed for analysis.

Incidents can be classified as follows
(incident kind, incident type):
- Transaction kind: freely definable, 2-stage classification, e.g. form as letter, e-mail, phone call, fax, etc.
- Transaction type: freely definable, 2-stage classification, e.g. content as acquisition, complaint, condition contract, appointments, etc.

Incidents can be linked as follows:
- To orders, offers, purchases
- To articles, batch numbers, article specimens, serial numbers

Recurring incidents may be given a time frame.

Mailings

An implemented data export interface to text processing systems allows manifold data preparation for mailings, regardless of the aim or target group of the mailing. CASYMIR supplies the required address on the basis of a sophisticated selection tools. The selection patterns deriving from criteria and conditions can also be saved. This allows to reproduce or restart certain mailing actions at any time. Naturally, saved selection patterns can also be combined.

Mailing criteria/Address sorting criterion

The data basis mentioned above proves a high degree of flexibility in marketing actions, since criteria and conditions to the address selection can be drawn from any of the modules connected to the CRM module. Apart from the usual address-related filters, this allows to draw on criteria from the following areas, among others:
- Companies (e.g. specific company sizes or sectors, ...)
- Orders (e.g. minimum turnovers, purchased quantities, etc.)
- Articles (e.g. which articles have been purchased by whom, how often?)
- Stock (who received deliveries from which batch and who supplied said batch?)
- Production (which customers received articles from a specific serial number ….), etc.
- The selection criteria may also be combined logically.

An example

The following shall serve as an example for the complex filter and sorting criteria (any kind of selection is completely menu driven).
«I need the addresses of the purchasing agents of all Germany-based companies which have generated a turnover of at least 100 000 EUR in the user software division. Only select companies having purchased at least five licences, but omit those located in the 66xxx postal code area. Add the addresses off the managing directors if the company has activities in the database software domain.»

The search queries can be saved in order to re-evaluate them later on the basis of an address database that has been changed in the meantime.

Interfaces
- Import of CSV address data to be linked to a specific marketing event or an order
- Export of address data to any data format

Settings
- Configuration by master data entry.