MULTIDATA
We integrate your daily business.

Create tickets quick and easy with our system

Neither do forget customer birthdays, anniversaries, offers nor phone calls. Our system reminds you of important appointments and tasks and eases your habitual working processes. No matter if distribution, marketing or project management – with our CRM solution you are always perfectly informed.

A Customer Relationship Management is an integrated estimate of the business management. It integrates and optimizes across departments all customer processes in marketing, sales and customer service on the basis of a database and software for the market preparation as well as for a defined sale process.

The MD-Premium.NET CRM module from Multidata helps you to manage existing and new addresses, remember appointments, manage your camgaigns, set tickets quickly and easily (also via drag&drop) and automatically initiates processes.

CRM Tools at glance

Setting new customers - free addresses

With the address mask the free adresses (contacts which are no customers or suppliers yet) can be easily managed. This new assress-root allows the assignment of contacts and an automatic creation of contacts from the companies register by compass real time.

Once the addresses are implemented they can be dsiplayed and edited in this mask. Furthermore the record can be added to a campaingn. The assumption into the customer/supplier master can also be done here later.

Management of new and existing contacts - the address mask

The search and management of addresses is done by the menu item CRM/Address search. By entering a search term all found addresses will be displayed.

If the result is a main adress then all relvant contact persons will also be displayed. In the event of a hit for a contact person only this person including the main address will be displayed. Data from the person table are only displayed if the person is not assigned to the main address. Contact persons associated with the identifier „X“ (disabled) are displayed crossed out.

Telephone, web and mail button

MD-Premium.NET CRM is equipped with a TAPI interface (based on TAPI3) for in- and outgoing calls. With menu item “System/ Workplace” the settings are handled for each of appropriate workplace.

To get tasks faster done by telephone, there is a button next to the phone number of the customer/interested parties. With a click on it, the phone number will be dialed.

When the line is properly selected both, in- as well as out-going calls, show a dialog that automatically assigns the number to your master data. This also applies to mobile phone numbers. Similarly, you can click the button next to the registered internet address to open the website or send a message to the specified e-mail address. Incoming mails are automatically synchronized using an Outlook Exchange connection to your MD-Premium. NET CRM. They are filed and archived under correct contact under tab “Communication”.

Editing your contacts - campaigns

Campaigns provide structured processes in your company and for any work which consist of several steps used. In other words, the campaign management shows to the persons involved in this working process what and in what time-controllable order has to be done.

Identifying opportunities - Sales projects

A sales project evaluates a possible opportunity and is always associated with a campaign. When you open a campaign entry, associated with a sales projekt, the input mask is extented by an additional group called „projects“. In this window the details of the project data can be carried out.

MD-PREMIUM.NET
CRM

Contact

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Customer Relationship Management

For the analysis of the sales projects three basic queries are provided via the menu item „CRM/Statistics“:

- Forecast: the basis of this evaluation are all uncompleted distributions which have set the FORECAST field in the project data.
- Won sales projects: shows all winning distribution projects for the current and the previous year
- Lost sales projects: shows all lost distribution projects for the current and the previous year

Problem solving - Ticketing system

Our CRM system offers a far-reaching processing of problems/complaints and allows the entering of different error codes, different priority levels and progress statuses.

The CRM system is combined with a serial number (also multiple serial numbers) as well as a maintenance contract file. Thus, it is possible to document a precise service flow with individual components. The ticket management can go through a four-eye principle.

Creating a new ticket using the drag & drop system

A ticket/new claim can be created in no time. Just drag the e-mail into the claim/ticket window. A new claim will be created and the subject of the e-mail is automatically used as title. If the sender's e-mail address is stored in the database, the system can assign the claim to a customer, a contact or system.

If the e-mail has any documents attached, the system will make a copy of the complete e-mail, including attachment(s) and stores it under the index “documents”.

Next to that it is also possible to add an e-mail to an existing ticket/complaint by using the drag & drop method - doing so creates a new record.

Workflow tool

Automation in the sales process is very important. The workflow tool contains a complete resubmission system which enables the automatic resubmission of customer telephone calls, offers, invoices and further documents. Next to that it's possible to show a practical task list. Because of the workflow optimization, the sales team can carry out all work processes on the correct time period.

Control mechanisms

Beneath the info text box „INFO TEXT-CRM“ you can find important data and information about a customer/interest.

The information, that is displayed here, will be located directly at the start of every new CRM.

By opening a new ticket the system checks automatically, if there exists a customer lock.

Final control

In the menu „CRM“ there is a „ticket overview“, which serves as a control instrument. Every ticket, that is still in process, can be seen here (status „In progress“, „Waiting internally“ or „Waiting for answer“) as well as all finished and closed claims, that have no conclusion mark set yet.

After final inspection of the ticket and setting the conclusion mark, it will not show up on the “ticket overview” any more.

Next to that, the program delivers an exact documentation of how the ticket was solved. An internal forwarding to other colleagues enables a frictionless workflow.

Sales management

A smooth, computer-aided process is of immense importance for each business. In the Multidata software, this consistently is transferred through the CAS module. Known inquiries, visit reports and telephone reports can be stored and evaluated (opportunity management system) by different representatives per customer.

Sales analysis

MD-Premium.NET CRM allows you to make decision-oriented

queries and data analysis with the module “OLAP & Charts” like e.g. competitive analysis of recorded instruments, purchase behavior to a given time, and much more. This analysis assists in planning of further, strategic measures.

Informing - Use the CRM-Tool for your marketing

Newsletter

With the newsletter tool several newsletters can be created, managed and sent to different target groups. The auto-response messages, such as cancellation of the newsletter are automatically recognized by the system and the intended recipient of the newsletter is automatically removed from the list. The templates are created in Microsoft Word and sent in HTML format.

Serial letter

With the serial letter feature marketing campaigns can be carried out system-based. The templates are created in Microsoft Word. Each created letter is stored in the CRM system of the receiver.

In the tab “Communication” it’s possible to trace, which persons were addressed for certain promotion actions and if the person has been make use of this promotion action.

Search function

There is a simple and intuitive search system over all the data integrated. This can be carried out at the field level or comprehensive. The search results will be displayed in clearly index lists. By selecting one result you will be linked to the detailed mask.

Organizational structure

The CRM system has a horizontal as well as vertical permission system. By this way customers, orders and documents can be assigned to different user groups (grouping hierarchy). This is known as the button down principle.

Reporting

The reporting system covers all data tables, such as person data, order data, documents and turnovers. Besides a large number of standard reports other reports can be created using OLAP technology or “Crystal Reports”.
All reports can be exported to PDF, XLS and CSV.

Industry solutions

In addition to the general MD-Premium.NET CRM, an industry-oriented solution for the financial sector has been created.

This includes financial industry specific aspects, such as contract management, agent administration, a collection of commission data, a basic catalog of insurance companies registered in Germany, building societies and investment companies and their products. There are approximately 800 companies and approximately 10,000 products included in the base catalog.

Especially the innovative permission system from MD-Premium.NET CRM is a great help for the financial industry and their sales organizations.

The most complex sales structures with multiple stages, specialists, tipsters, analytical writers, equity transactions etc. can easily be mapped. At the same time it doesn‘t matter if another office or organization unit is between it and the headquarter.

MD-Premium.NET CRM is connected with accounting system of IBECON GmbH by an interface, so that the most complicated accounting systems and accounting creation processes can be sourced out fully automated. Only the costs for the accounting system and an own commission accounting additionally incur.