CRM Integrated Customer Relationship Management

Build and maintain your customer base with Integrated CRM

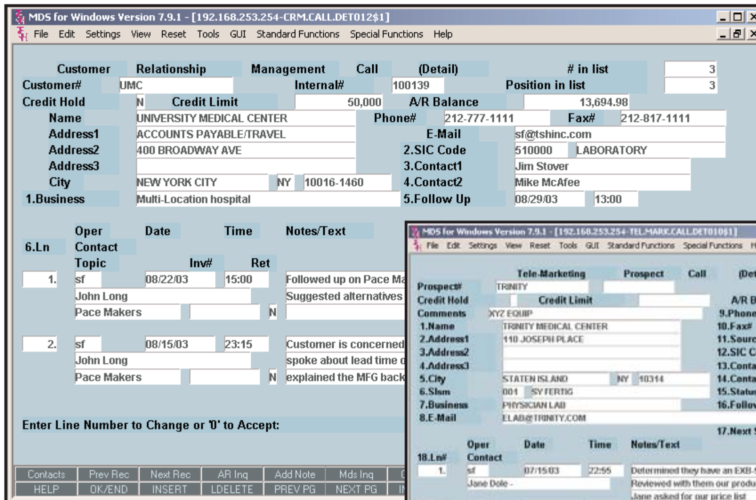
Dual functionality helps close sales and improve customer relationship management

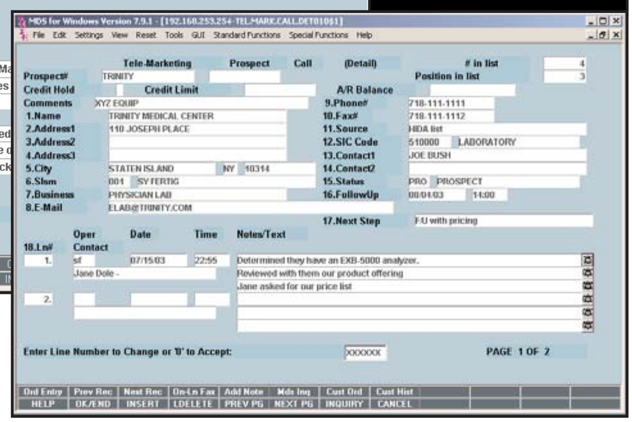
During the past several years, Customer Relationship Management (CRM) has emerged as a critical tool for business.

People buy from people – not from companies. Not too long ago, companies relied more on the personal contact of sales and customer service reps to establish and maintain the customer vendor relationship. Customers knew their account reps, and it was that account rep who introduced them to new products, gave quotations, and followed up on customer service issues. However with the relentless move towards greater efficiency, the customer is being serviced by different departments at different times. Without a customer relationship management system, the rep must rely on his or the customer's memory to recall orders and quotes, and he might have to explain the same problem (with an order or a faulty product) over and over again to each person he talks to.

Customer relationship management involves automating and integrating every aspect of the customer relationship so that the customer's information passes smoothly from individual to individual, and the account rep now dealing with the customer has at his fingertips all the information required to properly service the account, regardless of how the information entered the system.

Many wholesale distributors attempt to integrate their "back office" distribution application software from one vendor with e-commerce software from a second source and marketing and sales force automation software from a third source like Goldmine or Saleslogix. Because the **MDS CRM modules are fully integrated, TSH offers a competitive advantage** far more





MDS CRM allows you to increase productivity by easily managing customers (left) and prospects (below).

functional than any multi-party solution. We can insure that the sales force knows what their customers are being told by the customer service reps, they can check the status of all orders, and determine if there is a collection problem. Conversely, in-house personnel can easily determine what sales commitments have been made, and the status of any outstanding quote or order.

The MDS CRM system has two modules; one geared towards the **sales effort**, and the second geared towards the **management of customer relationships.**

Sales Management Module

The Sales Management Subsystem is designed to support corporate sales efforts, and provides salesmen with fully integrated access to the MDS database. A separate prospect file is maintained so that when marketing efforts succeed in obtaining an order, the prospect can quickly be converted to a customer.

The system maintains an updated "call list" by salesman, and identifies which prospect and/or customers to contact, and in what sequence. The selected prospects are displayed in the requested sequence, in a summary mode. The operator can then drill down to obtain detailed prospect and call history information, for review and maintenance.

The salesman has full access to the customer's open orders, quotations, and sales history files. In addition, the salesman can link external documents, literature, quotations, and correspondence using the MDS Document Management System. The Contact Management aspect provides the ability to identify the customer contact in any telephone interaction and have available all information about the customer including problems, opportunities, and ongoing conversations, in addition to the data base information.

continued...

The Systems House, Inc.
Software Solutions for Distributors
1-800-MDS-5556
e-mail sales@tshinc.com • www.tshinc.com

Lastly, the system provides the ability to formulate a fax list, identify the document(s) to be sent, and to initiate the unattended faxing (or E-mailing) of the documents.

Customer Relationship Management

The Customer Relationship Management Module Sales Management Subsystem is designed to support the relationship with existing customers. It can be used to support the collection efforts of the Accounts Receivable department, as well as the activity of the customer service department tracking service, product and delivery issues.

The system maintains an updated "call list" by operator, and lists the customers to be contacted in the sequence previously specified by the operator. The selected customers are displayed in the requested sequence in summary fashion. The operator can then drill down to each individual customer.

To support the collection efforts, the operator has access to all accounts receivable information, and has the ability to post a credit card payment on-line directly from the CRM screen. If the customer claims that an unpaid invoice was not received, the operator **can directly fax or e-mail copies of any required invoice(s), statement or delivery receipt.**

The operator has full access to the customer's accounts receivable, open orders, quotations, and sales history files. In addition, any individual can link external documents, literature, quotations, and correspondence using the **MDS Document Management System.** The program identifies the customer contact in any telephone interaction and makes available all information about the customer including prior collection efforts, problems, and ongoing conversations, in addition to access to data base information.

For more information on CRM and Master Distribution System from The Systems House, Inc., contact TSH at 1-800-MDS-5556, or email sales@tshinc.com

Published by:
The Systems House, Inc.
Notch View Office Park • 1033 Route 46
Clifton, N.J. 07013
973-777-8050 x 641 • 973-777-3063
www.tshinc.com • 1-800-MDS-5556