

Attaché CRM

Because customers are your most valuable resource

Attaché CRM (Customer Relationship Management) helps you capture all customer dealings and places the information at your fingertips. Highly customisable, Attaché CRM is ready to adapt to your specific needs.

Capture all interactions

- Create unlimited contacts per customer within unlimited departments.
- Create detailed records of customer discussions.
- Create unlimited Contact Type codes to categorise interactions for follow-up and analysis purposes.
- Import emails received from customers.

Centralised information

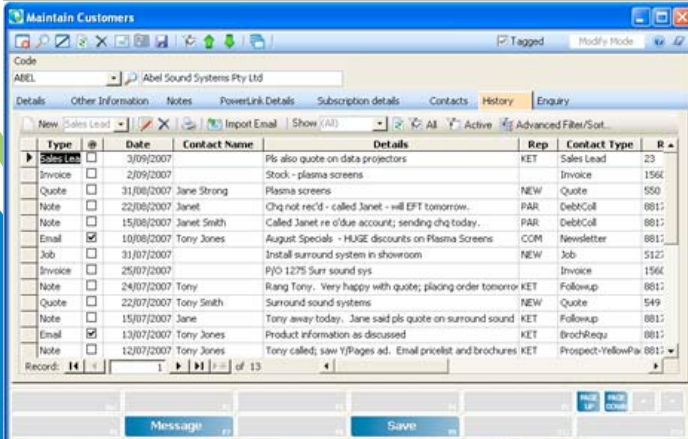
- See all interactions on one screen: details of discussions, emails, sales leads, quotes, jobs and invoices.
- Create over 160 custom fields to hold additional data including text, memo, date and look-up fields.
- Store customer documents such as contracts and pricelists.
- View Enquiries to see account status, sales history and more.

See the details you need

- Filter and sort based on contact type, date and sales rep.
- Select to view only one type of transaction, for example: just Quotes.
- See a summary of all transactions, or double-click the details to drill in.
- See all records or just those that are active.
- Sort records into ascending/descending order by right-clicking the relevant cell.

Professional communications

- Create HTML emails, selecting the preferred recipient from the customer's contacts.
- The built-in HTML editor allows you to easily personalise emails by adding data fields.
- Preview emails before sending.
- Send emails to one recipient or create mass email campaigns such as newsletters or marketing promotions.
- Create mail merge letters and internet faxes.
- Automatically update customer history when sending messages.



Type	Date	Contact Name	Details	Rep	Contact Type	R
<input type="checkbox"/>	3/09/2007		Pls also quote on data projectors	KET	Sales Lead	23
<input type="checkbox"/>	2/09/2007		Stock - plasma screens		Invoice	1566
<input type="checkbox"/>	31/08/2007	Jane Strong	Plasma screens	NEW	Quote	550
<input type="checkbox"/>	22/08/2007	Janet	Chq not rec'd - called Janet - will EFT tomorrow.	PAR	DebtColl	8811
<input type="checkbox"/>	15/08/2007	Janet Smith	Called Janet re o'due account; sending chq today.	PAR	DebtColl	8811
<input checked="" type="checkbox"/>	10/08/2007	Tony Jones	August Specials - HUGE discounts on Plasma Screens	COM	Newsletter	8811
<input type="checkbox"/>	31/07/2007		Install surround systems in showroom	NEW	Job	5125
<input type="checkbox"/>	25/07/2007		PJO 1275 Surr sound sys		Invoice	1566
<input type="checkbox"/>	24/07/2007	Tony	Rang Tony - Very happy with quote; placing order tomorrow	KET	Followup	8811
<input type="checkbox"/>	22/07/2007	Tony Smith	Surround sound systems	NEW	Quote	549
<input type="checkbox"/>	15/07/2007	Jane	Tony away today. Jane said pls quote on surround sound	KET	Followup	8811
<input checked="" type="checkbox"/>	13/07/2007	Tony Jones	Product information as discussed	KET	BrochRequ	8811
<input type="checkbox"/>	12/07/2007	Tony Jones	Tony called; saw YPages ad. Email pricelist and brochures	KET	Prospect-YellowPa	8811

Information at your fingertips: see all interactions on one screen, and drill in for more detail.

Powerful date-based reports

- Attaché CRM reads your sales transactions giving you up-to-the-minute information.
- Analyse sales by product or product group; by customer, supplier, sales rep or cost account.
- View information in detailed or summary format; or across the past 12 months up to a date you specify.

See sales history per customer

- Each customer's individual sales history can be viewed via the enquiry screen of the customer masterfile.
- Select from enquiries such as Product Sales Totals, which includes your top 10 products listed by quantity or value.
- Enquiries include parameter selection and drill-down support, for excellent data-mining results.

Product	Description	Qty	Value	Unit Price	Max Unit Price
E 000 000	SHOCK AND VIDEO TAPE	800	41.20	41.20	41.20
E 000 000	SHOCK AND VIDEO TAPE	800	52.80	52.80	52.80
RADIO	RADIO	120	48.00	48.00	48.00
E 000 000	3 HOUR BETA VIDEO TAPE	120	40.00	40.00	40.00
E 000 000	4 HOUR BETA VIDEO TAPE	120	52.00	52.00	52.00
RADIO	RADIO CASSETTE WITH SURFING ETC	120	200.00	200.00	200.00
CD	CD PLAYER WITH REMOTE & RINGS	70	300.00	300.00	300.00
TV	19" COLOUR TELEVISION WITH REMOTE	10	440.00	440.00	440.00
STEREO	STEREO MUSIC SYSTEM	10	717.00	717.00	717.00
TV	20" COLOUR TELEVISION WITH REMOTE	10	600.00	600.00	600.00

Sales history at a glance:

See up-to-the-minute sales data in the format that best suits your needs.

Customise to your needs

- With Reports Designer, enquiries can be customised then selected via the customer masterfile.
- Reports can be automatically converted to PDF format and attached to emails, or published with Microsoft Word or Excel.
- Web-based library of prewritten custom reports.
- With Solution Builder you can create and deploy applications, from simple forms that store extra information to applications with email and Internet support.

Manage sales activities

- Observe high level business activity via the Managers Enquiry screen.
- See all contacts for all customers, and filter by sales rep or completion status.
- See quotes and their profitability; filter by sales rep or completion status.
- Drill into customer masterfiles or transactions such as sales leads and quotes.

Attaché Customers

Attaché CRM

Attaché Suppliers

Attaché Products & Services

Attaché Job Costing

Attaché General Ledger

Attaché Payroll

Attaché Alex

Attaché ODBC

Attaché Archive



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