

CRMware 2.5 (Product of Bisware Technology Limited)

Introduction

Customer Relationship Management (CRM) is a strategic tool for company to improve its competitive advantage by tightening its business practices and by forging a strong connection with its customers. In the past, IT was often used as an operational tool for accounting, inventory, shipping, invoicing, manufacturing, human resources, etc. Management often uses past data to predict future activities. **CRM**, however, uses a different approach. It helps front end staff to understand individual customer behavior. It helps management to understand their staff abilities. The objective of **CRM** is to strengthen the competitive advantage of a company so that it is in a better position to attract new prospects while retaining valuable customers. **CRM** contains tools to manage and support effective marketing, sales and service processes using a customer-centric business model. It can help you manage and track all customer facing activities starting from the initial point of contact. It contains tools to get customer feedbacks and analyze customer behaviors. **CRM** data can be used to measure future value and profitability of existing customers. In other words, **CRM** helps business to increase revenue and profit while at the same time improves operational efficiency.

Our approach to CRM

We recognize that **CRM** is not solely to do with new breed of IT applications. **CRM** is a revolution in the way that business is done throughout the company. We offer **CRMware 2.5** (a web-based **CRM** application) to enable your **CRM** process. More importantly, we offer training to transfer business skill to your staff on understanding the wider context of **CRM**.

The screenshot displays the CRMware 2.5 web application interface within a Microsoft Internet Explorer browser window. The browser's address bar shows the URL: `http://localhost/Crm/crm/ContactDetail.aspx?Contactid=2012`. The application header includes a navigation menu with links for Home, Sales Force, Marketing, Support, Reports, Administration, My Account, and Logout. Below the navigation menu, there are search fields for Company and Contact. The main content area is titled "Sales Force > Contacts: View: David Chan" and features several tabs: Main, Rating, Relationship, and Attachment. The interface is divided into two main sections: "Related Functions" and "Profile".

Related Functions:

- Opportunity (1/2) - Add, View
- Case and Service (1/2) - Add, View
- Sales Order (2/3) - Add, View
- Service Order (0/2) - Add, View

Call:

Date and Time: 17 Dec 2007 17:27 (hh:mm) Bound: Inbound

Phone Notes: Handled

Date	Phone Notes	Record By	Action
28 Oct 07	inquire about our PC pricelist ✓	peter	
04 Sep 07	Request meeting with our Director. ✓	a	

Profile:

Role: Customer Allowed Team: A

Name Title: Mr Credit Points: 249

Display Name*: David Chan Other Name: Chan

Chinese Name: 陳大衛 Sex: M

Mobile Phone: 60332211 Business Phone: 29812222

Other Phone: 29812223 Fax: 29813434

Email: pyoung@viswaretech.com Other Email:

Assistant: Miss Wong Assistant Phone: 29812220

Job Title: Deputy Director Department: Admin

Company: Samson & Company Limited

Address: Room 2103, 21/F
Nathan Commercial Building
234 Nathan Road

City/District: Mongkok

State, ZipCode: Kowloon

Country: Hong Kong

Remarks:

Segment: company size 50 - 100

Segment 1: in medium grow market Distribution Grp: A

Feature Summary

CRMware 2.5 features with the following areas to maximize your competitive advantages:

Opportunity Management

- Keep track of all opportunities and their winning probability at various stages
- Support documents attachment to the opportunity
- Analyze "opportunities" by sales team, by individual staff, by sales category, by opportunity stage, by source, by opportunity status, by sales region, by opportunity period or any combination of the above
- Easy conversion from won-opportunity to order

Order Management

- Keep track of various stages of all orders
- Support documents attachment to order
- Automatically add Credit Point to Contact according to the amount of Order
- Different ways to handle Sales Order and Service Order
- Report "orders" by sales team, by individual staff, by order status, by sales category, by sales region, by order period or any combination of the above

Contact Management

- Keep records of all Companies and individual Contacts
- Support many-to-many relationship between Companies and Contacts
- Provide intelligent searching feature
- Support document attachment to Company and Contact
- Support adding unlimited items of additional information about individual contact
- Keep track of services and cases of individual contact
- Provide direct link from contacts to their opportunities, orders and cases

Marketing Management

- Feature with analyzing the effectiveness of marketing campaigns and sources
- Feature with Survey Builder for creating web page to get customer feedback
- Feature with Email Builder for creating soliciting email which can redirect email recipients to the survey site
- Keep individual customer feedback at the database for further analysis
- Customer current and future value rating feature
- Contact segmentation for marketing purpose
- Incentive Credit Point feature for value customer
- Track all cold calls and inquiries

Service Management

- Keep track of support case and service to individual customer
- Support documents attachment to each service
- Report unhandled "cases"

Staff Collaboration Management

- Provide granular control of user permission for using this system
- Segment salespersons to different teams for using team proprietary information
- Provide staff Daily Report feature
- Provide Forum for staff to share their experience
- Feature with a free-style Knowledge Base of self-products and other related-products
- Report staff contribution to the system
- Provide task assignment feature
- Include PDA version for off-site salesperson

Customer Service Center

- Support creation of individual customer account for accessing Customer Service Center
- Customizable Customer Service Center page for product promotion, company news, incentive announcement, etc.
- Self-checking order status, credit point and case status features
- Form download feature

The screenshot displays the CRMware Contact List interface within a Microsoft Internet Explorer browser window. The address bar shows the URL: <http://localhost/Crm/crm/ContactsByGroup.aspx>. The page features a navigation menu with options: Home, Sales Force, Marketing, Support, Reports, Administration, My Account, and Logout. A search bar is present with the text "Company Search:" and "Contact Search:". The main content area is titled "Marketing > Contact Segmentation" and includes filters for Contact Type (Customer), Current Value (ALL), Future Value (ALL), Sex, and Credit Point (0 to 1000). Below the filters is a table of contact information with columns: Type, Name, C Name, Credit, Phone 1, Phone 2, Email, Company, and Served By. The table contains 8 rows of data.

Type	Name	C Name	Credit	Phone 1	Phone 2	Email	Company	Served By
C	David Chan	陳大衛	249	60332211	29812222	pyoung@viswaretech.com	Samson & Company Limited	angus
C	Rose Wong	王露茜	0	98321111		pyoung1000@yahoo.com.hk		alice
C	K K Lee	李國光	38		29182222	hk60307320@hotmail.com	Samson & Company Limited	angus
C	Au Wai Min	區健明	0		29182333	petersgyoung@hotmail.com	AA Trading Company	anita
C	Eric Huang	王文明	35		23342111	peter@viswaretech.com	A Company Limited	anita
C	Betty Lam		0	98531111		peter@viswaretech.com	Ho's Company	alice
C	Lee Man Man		26		23821111	s9504102@netvigator.com	Dickson Trading Company	anna
C	Tony Chan		95		23487677		Yeung's Company	benny

Benefits of CRM

- Increased sales through understanding the needs of your top customers
- Holistic view about sales and marketing on what had happened, what is happening and what will happen
- Information sharing among all staff
- Better organization of customer service history and related documents
- Better customer service and thus better chance of winning repeat business

CRMware 2.5 Editions

CRMware 2.5 comes with two editions: **CRMware Lite Edition 2.5** and **CRMware Professional Edition 2.5**.

CRMware Lite Edition is designed for business with not more than 8 salespersons and **CRMware Professional**

Edition is designed for business with more than 8 salespersons. Their suggested configuration is as follows:

	CRMware Lite Edition 2.5	CRMware Professional Edition 2.5
Number of users	Not more than 8	No limit
Web Server	IIS 5.1 or 7.0	IIS 6.0 or 7.0
Server	Windows XP Professional (run as server) or Windows Vista Business (run as server)	Windows 2003 Server or Windows 2008 Server
.Net Framework	2.0 plus Ajax Extension Or 3.5	2.0 plus Ajax Extension Or 3.5
Database	SQL Server Express 2005	SQL Server 2005
Client	Any computer with modern browser (recommended browser is I.E. 6 or above)	Any computer with modern browser (recommended browser is I.E. 6 or above)

Online Demo

To better understand **CRMware 2.5**, please visit our demo site at:

<http://crm.biswaretech.com>

Login User ID: **readOnly Guest**

Password: [blank]



Bisware Technology Limited

Web site: <http://www.biswaretech.com>

Enquiry: crm@biswaretech.com