

CRM



IRIS Exchequer CRM - sophisticated customer intelligence

In today's competitive environment, ease of access to intelligent information on potential and existing customers is critical to business success

IRIS Exchequer CRM provides a comprehensive suite of tools that all your teams from customer service, marketing, sales, support and finance will wonder how they ever managed without.

Combining and utilising all of your organisation's knowledge, information and expertise IRIS Exchequer CRM enables you to remain completely focused on the needs and requirements of your customers and prospects.

From the day-to-day management of contacts, the tracking and monitoring of campaigns and pipeline sales opportunities, IRIS Exchequer CRM works in harmony with other IRIS Exchequer modules to deliver an integrated true customer relationship management solution that is so much more than just contact management.

IRIS Exchequer CRM delivers time-saving features including telephone integration, sales and purchase ledger drill-down, products and pricing lookups and truly insightful historical analysis.

Creating quotations is easy, whether in the office or on the road, using the products and pricing data held within the IRIS Exchequer customer and stock records. Proposals generated can simply be converted into sales orders and processed by IRIS Exchequer order processing driving efficiency and reducing margins for error.

IRIS Exchequer CRM is fully scalable and modular so you are free to select which options are required now, and then develop your solution as your business needs dictate.

IRIS Exchequer CRM is powered by



B2B and/or B2C customer relationship management within one system

Manage your sales cycle from start to finish

Share information across your whole organisation and arm your sales and marketing staff with the power to be proactive in an increasingly challenging environment

IRIS Exchequer CRM delivers an end-to-end suite of customer relationship management modules, that are 100% focused on the needs of the front-office and customer-facing staff, yet integrate with IRIS Exchequer ensuring all elements of your business perform together.

IRIS Exchequer CRM has been intuitively designed to map the whole sales process from initially capturing a contact's details, running marketing campaigns and telesales activities to producing quotations and sales orders. It lets you see return on investment by analysing the success of particular products, territories, sales personnel, processes, marketing campaigns and more - providing an unparalleled level of interrogation and analysis.

This powerful combination delivers the functionality to manage your sales cycle from start to finish and equip staff with the information held on your back-office systems. Dynamic analysis and detailed management reporting provide a complete view on your customers, suppliers, sales, services and products.



Key benefits

- Configurable for any size or type of organisation with a flexible modular approach
- Capture data on every interaction with every one of your contacts
- Powerful and intelligent interrogation functionality with dynamic management reporting
- Integration with other IRIS Exchequer modules, including drill-down functionality
- Comprehensive sales and marketing intelligence; spend your budgets wisely, know what works, analyse marketing campaigns on a cost per lead basis
- Dynamic integration with Microsoft Office providing full document management
- Sales force, marketing and field service automation; excellent support for off-line and remote working - take orders whilst 'on the move'
- End-to-end order lifecycle, with the ability to raise quotations, orders and invoices
- Campaign, pipeline and sales lead management
- Integration with the most widely used telephony systems 'out of the box'
- Customisable screens; rename fields, labels and modify layouts - ideal for industry specific terms, field masking and multi-lingual operations

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With senior staff often in different countries we needed a robust CRM system capable of moulding to the unique idiosyncrasies and demands of our industry. IRIS Exchequer CRM has risen to this challenge enhancing internal information flows and assisting with all aspects of our marketing, sales and customer satisfaction processes.

Stage Technologies Ltd - offer engineering solutions for entertainment venues worldwide, bringing the extensive benefits of automation technology to the live performance

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Complete visibility

IRIS Exchequer CRM captures data on every interaction with every one of your contacts

IRIS Exchequer CRM extends the management of your prospects and customers into new realms, far beyond the capabilities of any contact manager and many other CRM solutions on the market.

Vitality, all your staff will share a single, unified view of the customer. From credit control to sales; as new account details and orders are entered they become available to accounts for invoicing.

Staff can capture all the relevant information about customer organisations from single sites to multiple branches, divisions and locations, and multiple contacts at each branch; all managed in a familiar and logical tree structure.

Each record holds all the contact information your teams will need - from notes and contact details to quotes and opportunities, and a host of user-definable fields allow you to personalise the information you wish to store.

Seamless customer service

To deliver the outstanding service that builds and retains loyalty, all your staff need instant access to key information at all times

With IRIS Exchequer CRM, actions can be scheduled and automatically emailed to users who will be taken straight to the customer record to address any outstanding issues or opportunities.

All communication, including inbound emails, can be saved easily to the contact record or a particular sales project for instant retrieval. Cutting and pasting of email details will become a thing of the past, and all records will be kept current and accurate.



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A 10 module IRIS Exchequer CRM system configured for 24 network users has helped Ink Jet and Toners Ltd to double its turnover in 2 and a half years and improve margins by one third, with the same staff levels. Due to the highly successful deployment, the management team has decided to invest more in the system and increase its functionality.

Ink Jet and Toners Ltd - the largest specialist supplier of alternative inkjets and toners

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Information at your fingertips

Ensure that every single document related to a customer or prospect is instantly accessible

Your teams can produce, store and version-track letters, faxes, mail shots, spreadsheets, drawings, images and emails as well as link scanned hard copies and incoming electronic documents to your contacts, providing instantly accessible and reliable document management.

Documents are held centrally within IRIS Exchequer CRM so they are secure and accessible to all users, across multiple offices and remote locations - truly maximising your efficiency.

A wealth of information on customer purchase history over an unlimited time period is available. This in-depth knowledge provides true customer intelligence enabling staff to maximise opportunities, maintain customer satisfaction and allows powerful analysis of both your customers and products. Every detail including sales orders, invoices and credit notes, pricing, quantities, delivery and payment status and references, can be interrogated and reported on in a variety of ways.

Easy access to data on the move

The ability to react quickly to customers' needs is essential for organisations wishing to gain a competitive edge

Access key sales data and processes remotely to produce quotes and take orders whilst 'on the move'. This facilitates flexible access for key staff providing them with the tools to maximise every opportunity.

Robust data replication

Differences created whilst working off-line are brought in line using a simple and secure replication process

Unlike traditional methods, IRIS Exchequer CRM transmits individual changes in seconds. This avoids lengthy and unreliable synchronisation sessions and eliminates the risk of corrupt mobile data. Replication happens in the background while the user continues working, and can be reliably disconnected at any point, even part-way through.



Dynamic analysis and detailed management reporting on customers and suppliers, sales, service and products

Generate the optimum return

Make your marketing budget work harder

IRIS Exchequer CRM enables you to analyse your campaigns to determine which bring your business the best return. Interrogate campaigns on a cost per lead basis and ensure marketing efforts are concentrated on the activities that generate the most opportunities.

Marketing campaigns can be categorised and targets designated by almost any criteria. Managerial responsibility and activity costs can also be assigned.



Security Awareness Campaign

Campaign ID: 4002 Comments:

Start Date: 01/03/2006 End Date: 01/03/2007

Manager: Brian Bowman

Total Budget: 15,000.00 Total Cost: 12,000.00 Created: 06/03/2006 Daniel Cox

Change Parent

Summary **Activises** Target Contacts Leads Quotes/Orders Leads Analysis

| | | | |
|---------------------------------|--------|-------------------|------------|
| No of Contacts Targeted: | 22 | Cost: | 12,000.00 |
| No of Leads Generated: | 4 | Value of Orders: | 534.83 |
| Percentage of Targets Enquired: | 18.18% | Margin of Orders: | 131.7% |
| No of Quotes Generated: | 3 | Profit: | -11,868.25 |
| Percentage of Targets Quoted: | 13.64% | % Profitability: | -98.90% |
| Percentage of Leads Quoted: | 75.00% | Cost per Lead: | 3,000.00 |
| No of Orders Generated: | 2 | Cost per Quote: | 4,000.00 |
| Percentage of Targets Ordered: | 9.09% | | |

Lead Details

Applied Studios Ltd
Mr L Trentham (Luke)

Lead Id: 200001817 Created: 11/04/2000 Andy Abbot

Description: Re-wiring for new shop Product:

Recall: 12/04/2000 David Andersen Size: 5k to 10k

Status: Wait/Demonstration Margin: 2k to 5k

Status Date: 06/03/2006 15:32 Source: Website

Problems: 0 Responed: Website Consultation Request

Spoke: 11/04/2000 17:14 Analyst:

Close (mm/yy): 04/00 Guitometer: +H

Speak Recall Status Change Product Change Parent Product Duplicate Quick Email

Ancestors Budget Hotepad Documents Quote/Orders Action Log Campaign

| | | | |
|--------|-----------------------------------|-----------------------|------------------|
| 2542 | Company: A B Holdings PLC | Type: Direct Customer | Manager: DRC |
| 4947 | Division: Applied Studios Ltd | Tel: 01256 963746 | Operating Co: Z |
| APPL01 | S/Ledger: Applied Studios Limited | On Stop: No | |
| 2571 | Contact: Mr L Trentham | Tel: | Role: Main Buyer |

Maximise your marketing budget with powerful intelligent data

Greater sales efficiency

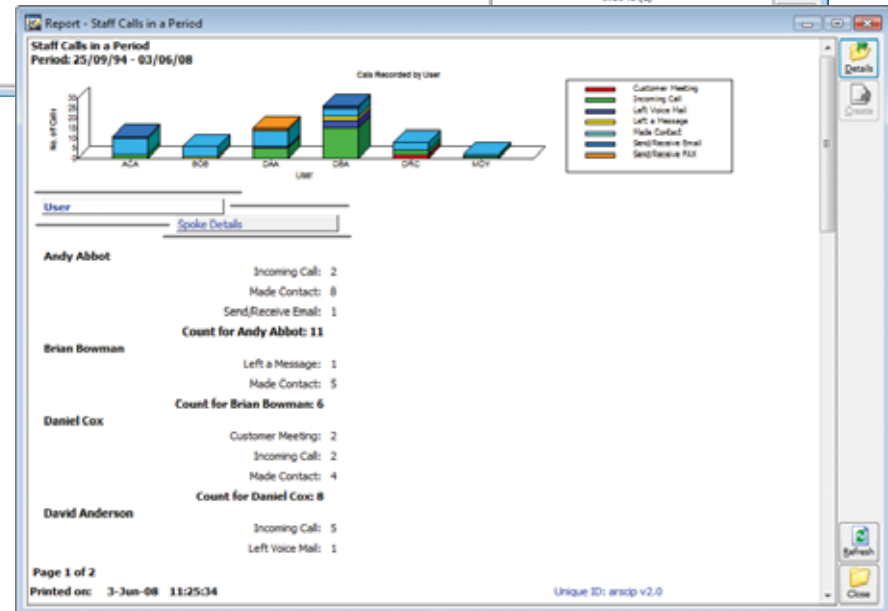
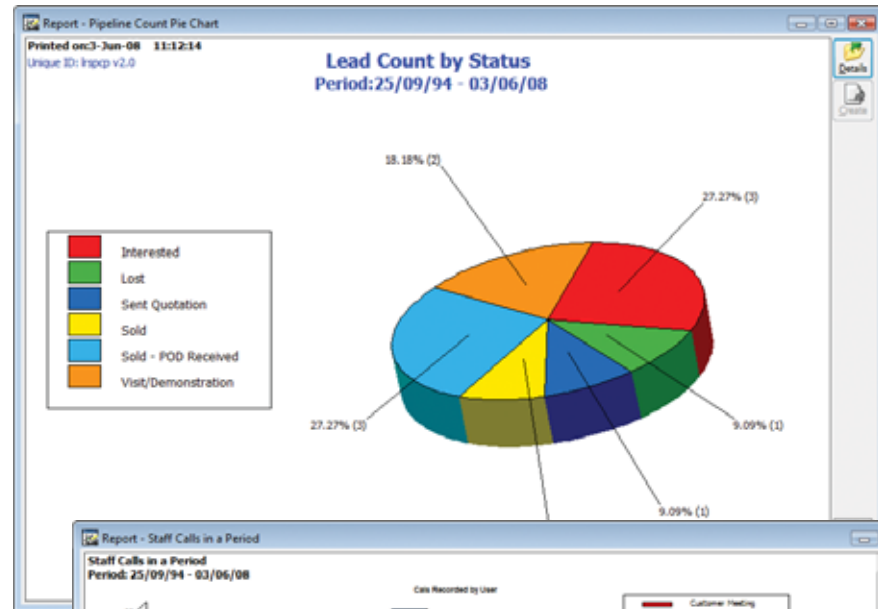
With IRIS Exchequer CRM, managers can maintain tighter control in tracking pipeline and sales opportunities

The interactive system empowers key individuals to identify and eliminate obstacles to successfully closing sales opportunities and ensure sales force energies are invested where they will bring the best return.

Effective management of sales opportunities

Manage individual sales opportunities even across multiple contacts

As sales opportunities are logged within the system, a variety of customer-defined details can be recorded, such as specific product or service type, new or repeat business, sales value, timescale or marketing source. All this information is displayed on one screen, providing the ultimate level of flexibility. Sales opportunities can be progressed through multiple user-definable steps to fit your sales process. Triggers and alerts can be set during the sales lifecycle to ensure no opportunities are overlooked.



Generate quotes effortlessly

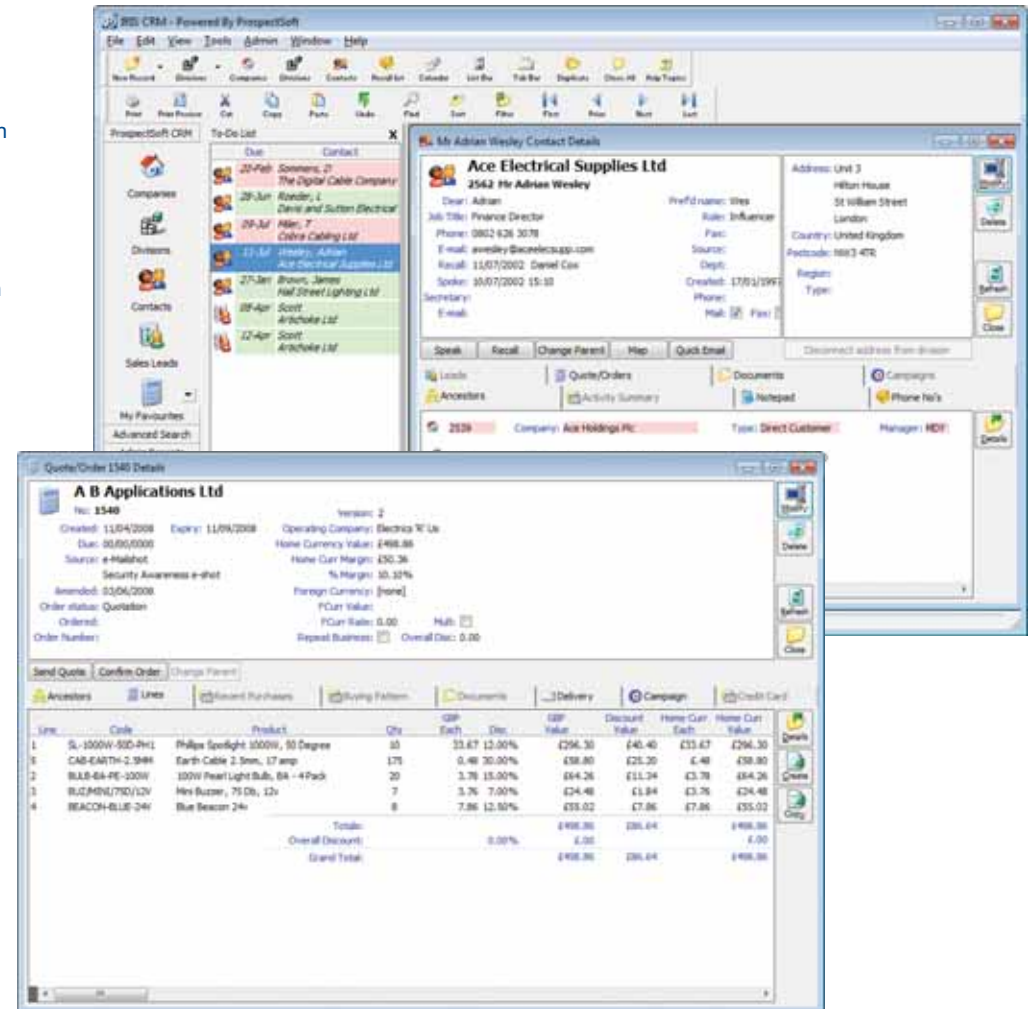
Make creating professional and profitable quotations easy

IRIS Exchequer CRM takes data directly from the accounts to produce quotations which can then be formatted in Microsoft Word, Excel or Adobe PDF document templates.

All staff have direct and instant access to critical information on product stock levels, prices and discounts, including product discount matrices where applicable.

Vitaly this can be used remotely, enabling staff to generate quotes whilst on site. Quotations can be created utilising the stock information held within IRIS Exchequer even whilst working off-line, and even when quoting prospects with no IRIS Exchequer ledger account. When an order is taken, the ledger is created automatically.

Equip your sales personnel with the essential tools to become even more efficient and produce quotations and close opportunities whilst on site.



“ IRIS Exchequer CRM interfaces well with the accounts side and allows both office based and field sales people to have up-to-date information, enabling us to keep track of hard-won sales enquiries. This gives all users visibility of what’s going on, and enables us to manage the sales activity better. Sales people whom I interview are very impressed with its capabilities, and I can’t now envisage operating without it!

Flowstore Systems - suppliers of storage and material handling systems and custom made solutions for manufacturing, storage and distribution

Integrated with your IRIS Exchequer solution

IRIS Exchequer CRM ensures valuable historical data is harnessed to deliver greater results for your organisation

Close integration between IRIS Exchequer CRM and the other business and financial modules delivers significant improvements in productivity, eradicates errors and avoids the duplication often seen with disparate solutions.

The screenshot displays the IRIS Exchequer CRM interface. The top window shows account details for 'ELEC01' (Electronics World Limited), including contact information and financial status. The bottom window shows a 'Copy Sales Invoice' and 'Remittance Advice' for the same account, listing various products and their prices.

| Our Ref | Date | Ex. VAT | Cost | Margin |
|-----------|------------|-----------|-----------|-----------|
| SN008368 | 12/12/2006 | £398.21 | £294.10 | £44.11 |
| SN008290 | 12/12/2006 | £254.31 | £215.32 | £38.99 |
| SN008107 | 27/09/2006 | £392.40 | £316.50 | £75.90 |
| SRC000455 | 27/09/2006 | £4,161.05 | £0.00 | £0.00 |
| SRC000425 | 23/09/2006 | £1,310.42 | £0.00 | £0.00 |
| SRC000506 | 20/09/2006 | £461.08 | £0.00 | £0.00 |
| SRC000400 | 31/08/2006 | £5,441.90 | £0.00 | £0.00 |
| SN008002 | 23/08/2006 | £3,541.32 | £905.28 | £2,636.04 |
| SN007854 | 30/06/2006 | £1,115.25 | £0.00 | £1,115.25 |
| SN007813 | 30/05/2006 | £990.22 | £133.12 | £857.10 |
| SN007824 | 30/05/2006 | £3,903.66 | £2,800.68 | £1,102.98 |
| SN007768 | 09/05/2006 | £207.72 | £224.90 | £82.82 |
| SRC000309 | 28/04/2006 | £5,919.75 | £0.00 | £0.00 |
| SRC000009 | 02/04/2006 | £437.20 | £131.16 | £306.04 |
| SN007621 | 02/04/2006 | £0.00 | £0.00 | £0.00 |

Find out more today

IRIS Exchequer CRM works in harmony with other IRIS Exchequer modules to share essential information across your whole organisation

You and your teams will achieve more with less effort and be free to focus on the strategic initiatives which take your organisation forwards.

For more information on the value which IRIS Exchequer CRM could bring to your organisation, please contact us.

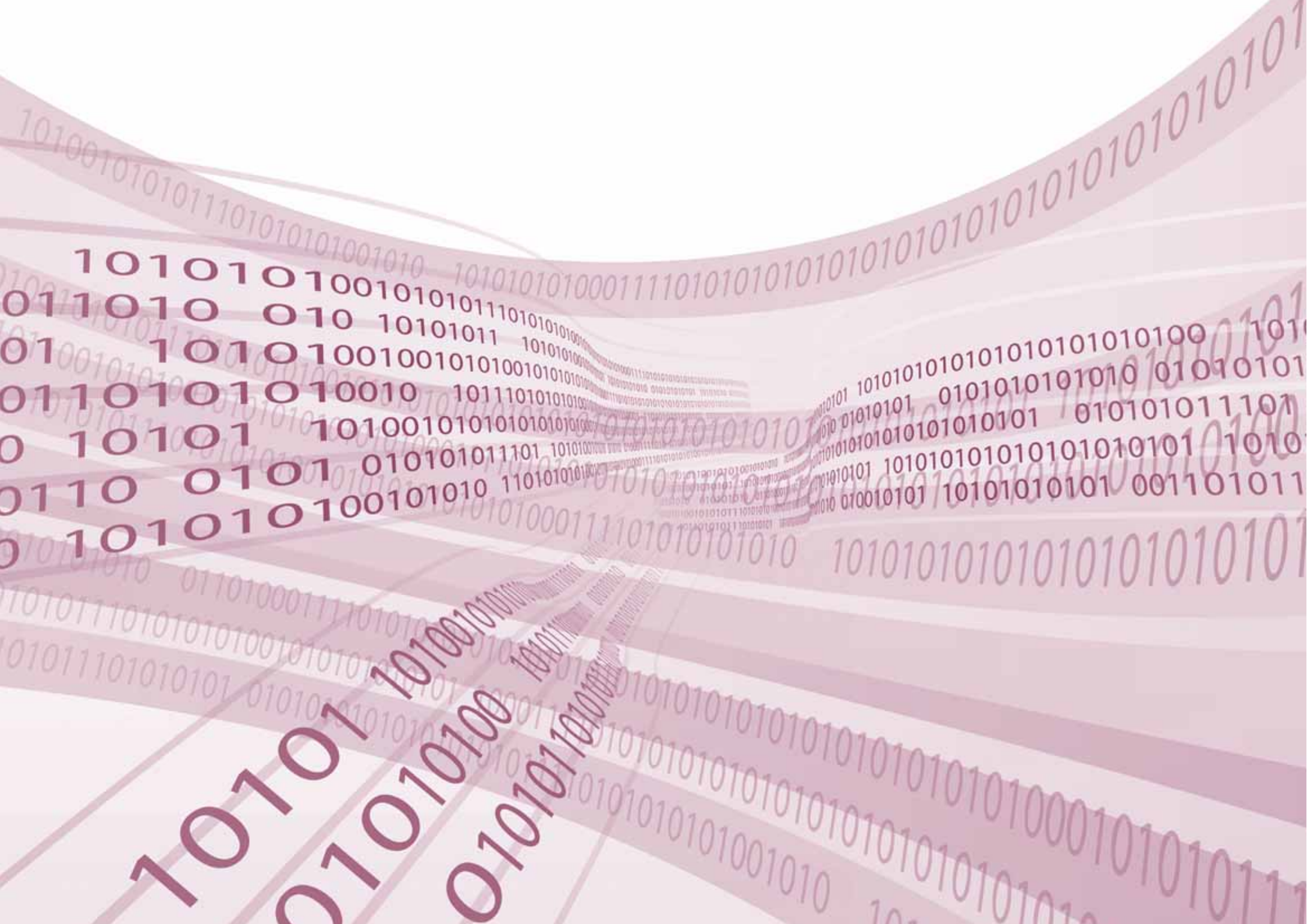


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In distributing mountain bikes, stock management and efficient processing are essential. IRIS Exchequer has provided this to our accounts and management team for years, but now, with IRIS Exchequer CRM, our business critical information and processes are also available to sales people in the office and on the road at the click of a button. This streamlines our business and allows us to deliver even better customer service and to increase sales.

Hot Wheels International - a leading bicycle and skateboard distributor

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www.iris.co.uk/exchequer

