

Customer Relationship Management

Mobility

Access all key data any time, anywhere

Pipeline management

Plan and manage your future opportunities

Integrated telephony

Make calls from relevant system records, route inbound calls based on system data/rules

Workflow management

Trigger authorisation requests, emails, SMS and pop-up windows yourself or from the system

Graphical time management

Graphical scheduling and calendars, time and attendance



The World's Best Integrated Business Platform

Manage customer relationships and the efficiency of your sales staff

Offer better customer service by using powerful pipeline management, integrated telephony and customer segmentation. CRM by HansaWorld is affordable and easy to use.

Contact Management

CRM by HansaWorld has a single register for all organisations with which you do business, whether they are customers, suppliers, prospects, press, trade bodies or anything else. People at organisations are also stored in the same register. You can relate as many people as you want to a single company. Store data such as people's multiple contact details, their job description and generic function, salutation information and the like. Contacts register is accessible by all parts of the system, so you can sell to your suppliers, buy from your customers, repair equipment for press contacts and the like. CRM by HansaWorld supports a wide range of detail being saved against the Contact record, including main address details, main delivery address, switchboard numbers and other contact information. Interfaces exist to popular post code addressing software for fast data entry of addresses.

"Using the CRM functionality we have categorised our customers and now can instantly see the source of our income and where to focus in the future." Patrick Verryn, CWM

Contact records can be categorised using CRM by HansaWorld's Category and Classification tables, which are defined by you. The Classification field supports more than 20 levels of such analysis, so you can break down these records by marketing source, region, industry, size, and whatever else is an important measure for you. The Category and Classification fields are available as selection criteria for reports (for example turnover/profitability for customers that replied to a particular marketing campaign), and batch routines such as mailshots/emailshots. In addition, CRM by HansaWorld provides 11 user-defined fields of different types.

Quotations/Pipeline Management

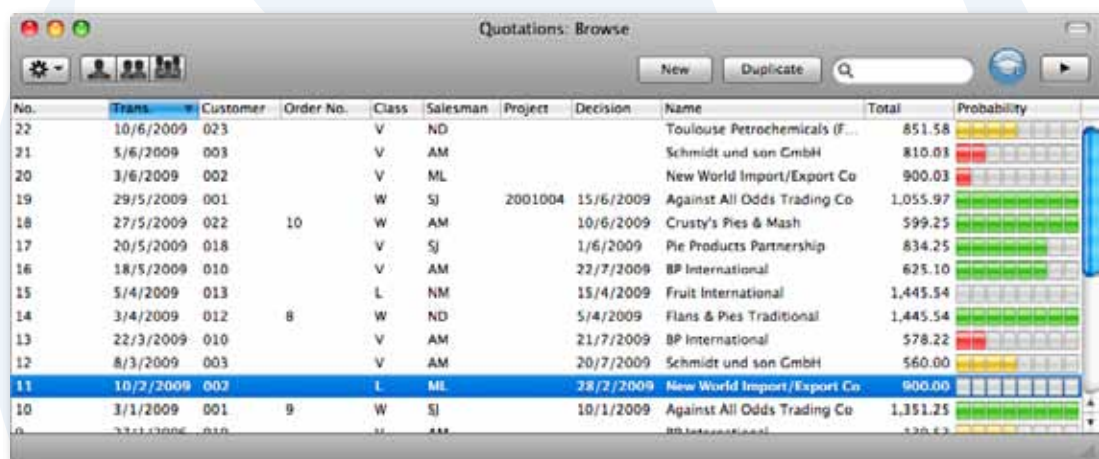
Quotations are easily entered to CRM by HansaWorld, allowing you to store details of customers, items and the prices and discounts you're quoting them. There are tables that store special deals on prices and discounts, per customer, that include retail-style promotions - buy one, get one free and multi-buys, date-specific and quantity-dependent pricing.

Once created, quotations can be printed to a user-defined form, and to PDF or HTML using CRM by HansaWorld's email engine.

Quotations can be classified by type, and CRM by HansaWorld allows analysis of which Quotations are open, accepted or rejected. In addition there are fields for expected decision date, next action date, and probability. Reporting includes all open quotations, conversion rates by salesperson and type of business, estimated value statistics, and information on the length of sales cycle and average values by various criteria.

Time Management and Scheduling of Resources

CRM by HansaWorld's Calendar functionality is centred around diary entries called Activities, which allow the user to record details of what to do when. Tasks can be given sub tasks, for management of more complex administration, and prioritised.



No.	Trans	Customer	Order No.	Class	Salesman	Project	Decision	Name	Total	Probability
22	10/6/2009	023		V	ND			Toulouse Petrochemicals (F...	851.58	
21	5/6/2009	003		V	AM			Schmidt und son GmbH	810.03	
20	3/6/2009	002		V	ML			New World Import/Export Co	900.03	
19	29/5/2009	001		W	SJ	2001004	15/6/2009	Against All Odds Trading Co	1,055.97	
18	27/5/2009	022	10	W	AM		10/6/2009	Crusty's Pies & Mash	599.25	
17	20/5/2009	018		V	SJ		1/6/2009	Pie Products Partnership	834.25	
16	18/5/2009	010		V	AM		22/7/2009	BP International	625.10	
15	5/4/2009	013		L	NM		15/4/2009	Fruit International	1,445.54	
14	3/4/2009	012	8	W	ND		5/4/2009	Flans & Pies Traditional	1,445.54	
13	22/3/2009	010		V	AM		21/7/2009	BP International	578.22	
12	8/3/2009	003		V	AM		20/7/2009	Schmidt und son GmbH	560.00	
11	10/2/2009	002		L	ML		28/2/2009	New World Import/Export Co	900.00	
10	3/1/2009	001	9	W	SJ		10/1/2009	Against All Odds Trading Co	1,351.25	
9	23/1/2009	010		V	AM			BP International	130.43	

Each Activity can be marked as to whether it will appear in the Calendar (date and time based graphical entries) or in the To Do list (simple list of tasks to perform).

CRM by HansaWorld's Calendar is a team-based system, rather than personal - you can review other people's diaries, and if necessary look at more than one diary at a time to see when several people are available.

Different types of work can be colour-coded, so you can see how anyone is planning or spending their time. Entries can be made for planned time and compared to actuals, and separate budgets can be prepared to see whether enough time is being spent on particular types of work. The graphical nature of these features makes employee chargeability easier to monitor, as you can immediately see which of a group of people is performing best. There are views per day, week and month, and up to three people's diaries can be reviewed simultaneously in the Calendar.

"With the help of CRM by HansaWorld's Task Manager and Calendar we can really plan our time better. It helps us to monitor each other's tasks, delegate and prioritize our daily workload."
Ara Darakjian, Darakjian Jewelers

If you have a group of employees (or subcontractors) who you need to schedule in advance, then multiple diaries can be viewed simultaneously from CRM by HansaWorld's Resource Planning module. You can create multiple views of who appears on which screen (by office, region, project etc), and you can drag and drop bookings between people (which reassigns who will be performing work).

As with the Calendar, double-clicking on an entry in the Resource Planning module drills down to the underlying Activity, allowing review and editing.

CRM by HansaWorld also offers a Timekeeper module that handles employee clocking-on and clocking-off. These records are triggered by simple data entry, at its simplest being fingerprint-driven, but end up in Enterprise's fully-featured Calendar and Resource Planning engines.

To Do Lists

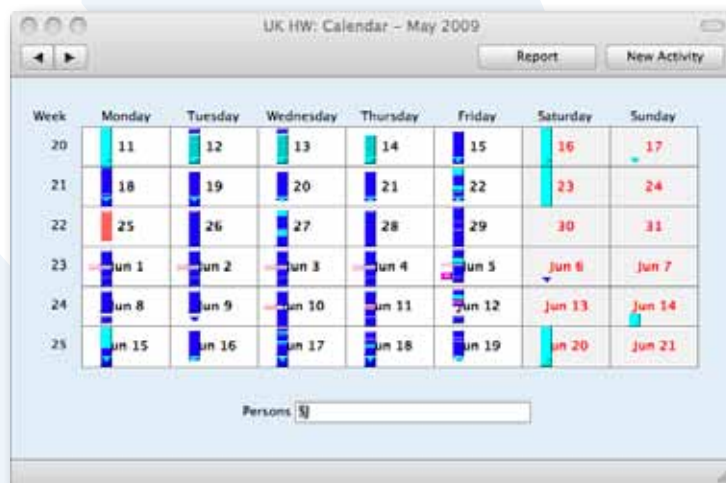
Each person has a To Do list made up of Activities marked as To Dos. This allows genuine groupware functionality, since users can view the To Dos for other people (for example when they are off sick). Each To Do list can be filtered on multiple criteria, to allow you to work only with the tasks that are relevant: for example, you can run through your phone calls, or your Priority 1 tasks, or everything you need to do for a specific customer. To Dos are viewed from a central Task Manager, and drill-down is available to allow the user to open the underlying Activity.

"We now have greater visibility at a glance to see where sales people are spending time and can measure the return our business is getting from this."
Michael Gigliotti, Time Out Sydney

Activities can be connected to any other record in CRM by HansaWorld by drag and drop. In most cases the activity gets linked automatically to the record from which it was created. As a result Activities become the triggers for doing anything within CRM by HansaWorld.

Workflow

Activities can be generated automatically as a result of sending a letter, quote or entering a contract. Thus, for any customer, a complete history of transactions and communications is instantly viewable on screen including what has been done and what is yet to be done. True workflow management can be achieved with a feature which allows Activities to be generated automatically as a result of completing other Activities with a specified code. For example, marking a credit control Activity as completed with a "Cheque is in the Post" result might automatically create another Activity in three days time to check the post and chase the customer again if the cheque is not received.



You can set Alarms on Activities to prompt you to complete them at a given time and date - these can open as pop-up windows, or send them as SMSs or emails.

Alternatively you may want CRM by HansaWorld to trigger the creation of a pop-up window, SMS or email on a given event. These are set in the Business Alerts module. For example, CRM by HansaWorld can trigger:

- a SMS to the customer thanking them for their visit if they came into the showroom
- an email to a manager alerting that a Quotation falls below the minimum GP allowed

Customer and Supplier Dashboard

Use the Customer Status report and Supplier Status report to give you a 360 degree view of all interactions with a customer, prospect or supplier. Based on user-definable rights, the user can be allowed to view:

- all emails sent and received for that customer
- all sms's sent and received for that customer
- all letters sent and received for that customer
- the Activities for that customer (if necessary sorted by type)
- value and status of quotations

Everything is drillable, for example allowing you to inspect an open Quotation, then run the customer status report to review the detailed quotation.

"The CRM solution has significantly improved the way we serve our customers"
Arnas Sirutis, Databalt

Letters and Mailings

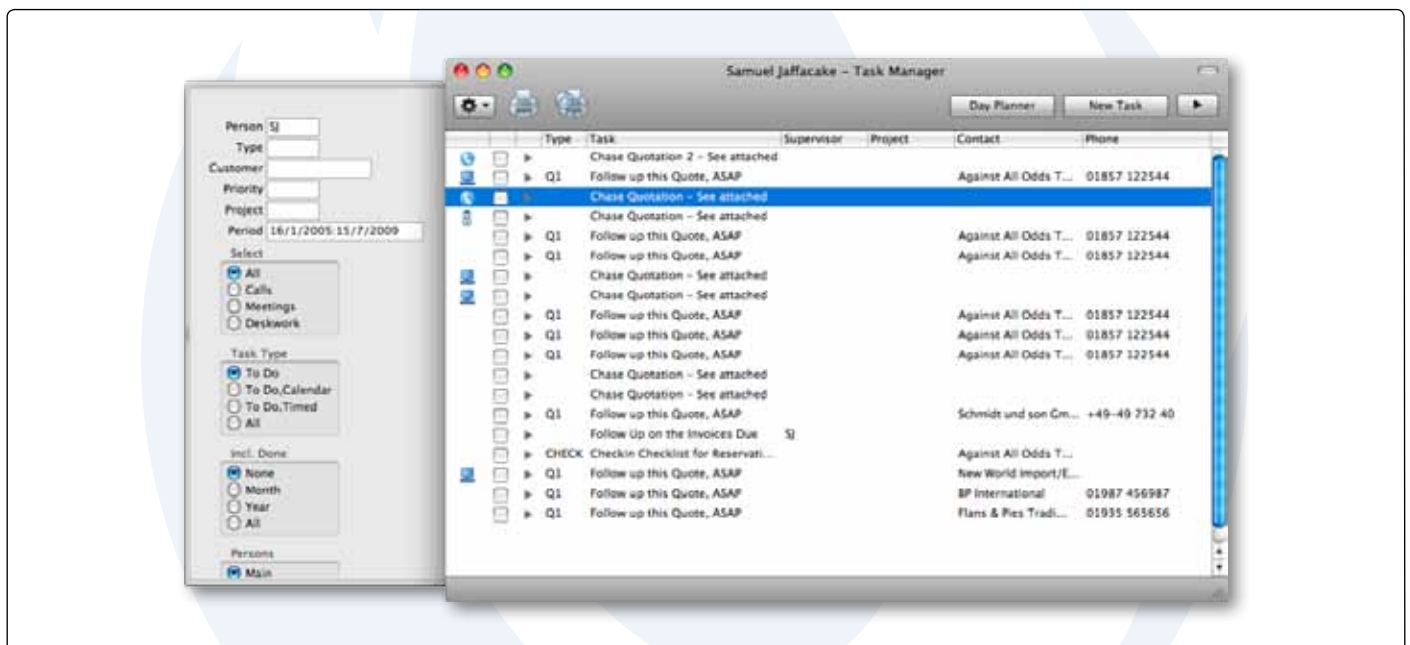
CRM by HansaWorld allows you to create standard or ad-hoc letters, which can be printed for individual or selections of customers, or prospects.

Each letter gives you control of the greeting (Dear Sir/Madam, Dear Jim and the like) and heading. In addition, you can create paragraphs of standard text, and bring them in to any standard letter with a single code. The letter list will show the proposed recipients of a mailing before you proceed, allowing you to change your selection criteria. As well as creating printed mailshots, the Customer Letter functionality can be used to send out email - and fax shots to selected groups of customers/ prospects/suppliers etc.

Reports and batch routines can be used to improve targeted mailshots. For example, use the Who has bought/not bought report to find customers who have bought (or not bought) a particular item within a given date range, and run mail campaigns with this information to offer upgrades or cross-selling of other products. Equally you can run a campaign based on who has done or not done a particular action (met with you, been quoted etc).

Collaboration

Keeping track of a discussion by e-mail can be a challenge. You have to make sure the right people are included in every mail's recipient list and either separately copy every e-mail to a certain folder or be ready for long and frustrating searches later. With CRM by HansaWorld the whole debate is saved in one place. You can choose either to have discussions inside one mail or to create a specific conference. In both cases it is possible to attach files and see who has updated, read the posts and deleted the mail.



Knowledge Management

Store copies of mails, whether internal or external, to multi-level personal archives if no one else needs access, or to Conferences, for secure archiving and quick access. Your company defines the folder structures in Conferences, creating logical places to store and retrieve any data worthy of sharing. Access rights can be set at the Conference level - for example at Board level for a Board conference containing minutes of meetings and key strategic decisions. Store external files against any mail at Archive or Conference level - creating a logical location for any of your data. Use CRM by HansaWorld's search engine to find any content in Conferences to which you have access.

Integrated Telephony and Communications

HansaWorld offers the ability to communicate with customers from inside the CRM by HansaWorld application. You can select the Business Communicator from any customer or supplier-facing record within CRM by HansaWorld, which then allows you to initiate emails, SMSs and telephone calls with the company or individual, and even open a map of their location. Emails and SMSs open relevant records in CRM by HansaWorld, where you enter details. Telephone calls interact with VoIP switchboards to make the call - these can include Skype, Asterisk and most switchboards with TAPI 2.0 drivers. Once the call is answered, CRM by HansaWorld opens an Activity record to allow the user to record details of the call.

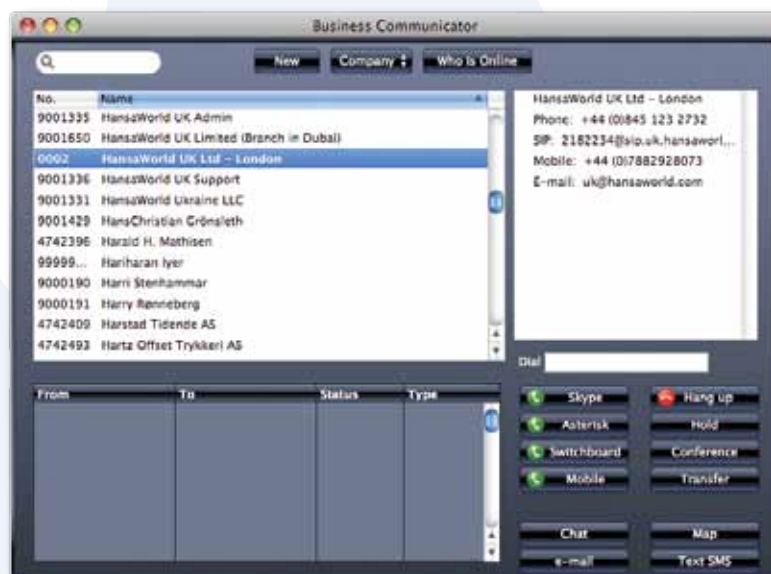
CRM by HansaWorld's integrated telephony also supports inbound intelligent routing. The switchboard passes CRM by HansaWorld the telephone number of the caller, and the program instructs the switchboard how to route the call. You can set rules for routing using HAL (Hansa Application Language).

"Business Communicator makes it easier for our people to record communications and follow the communication history of customers, suppliers and partners. The possibility to initiate a call straight from the quotation will make our customer service much more efficient."

Finnish Q3 Group

Mobile Solutions and Wide-Area Networking

All of the CRM by HansaWorld functionality is available to users logging in from anywhere in the world, from a variety of devices. Users can work from home or while on the road, logging in from any internet connection, whether or not broadband, or over a mobile phone network. Devices can include laptops, Windows Mobile real-time barcoders, and iPod Touches and iPhones. Users can run any of CRM by HansaWorld's standard or customised reports in real-time, and enter or review any data record. This breaks down the walls of your operation, allowing users to be productive wherever they are.



Modules

- Business Alerts
- Calendar
- Conferences
- Customer Letters
- Email
- Expenses
- Group Calendar
- Pricing
- Quotations
- Resource Planning
- SmartView (Business Intelligence)
- Task Manager
- Telephone Log
- Timekeeper

Technologies

- Business Communicator (Asterisk, Skype and TAPI)
- Forms Designer
- HAL Customisation language
- Intelligent Routing
- Interfacing Toolkit
- Massive Cacheing
- Real-time Interfacing
- SmartApps Designer
- Wide-area Networking

Internet Services

- Address Lookup
- Credit History
- Exchange Rate Lookup
- Postcode Lookup

Company profile

HansaWorld is a major international software company specialising in business optimisation solutions. The group employs around 300 staff in a strong network of daughter companies and distribution partners worldwide. There are offices in 19 countries spanning all the major continents, allowing HansaWorld to offer international implementations with a single point of contact across many countries.

The group was founded in Sweden in 1988, by Managing Director Karl Bohlin, and is currently headquartered in Ireland. The products are available in 27 languages and work with almost all computers and operating systems. There have been more than 74,000 HansaWorld installations at a wide range of organisations, from small and medium-sized businesses to entrepreneurial divisions of larger companies.

HansaWorld is one of the leading drivers to bring a new perspective to corporate software business needs. Traditional software companies continue to push a silo approach involving developing an Enterprise Resource Planning application that is difficult to integrate with other components such as Customer Relationship Management, Email, Document Management, Workflow and vertical market solutions. HansaWorld has pioneered the approach of developing solutions that cover almost all the company's main business needs in a single, integrated solution, and by underpinning these with constant technological innovation. As a result, this Integrated Business Platform unifies processes across all departments, through advanced software-based best practices which thereby improve the flow and value of business transactions to deliver time and cost savings at every level without compromise.

HansaWorld provides local product management for each market where it actively sells CRM by HansaWorld. This process covers not just translations (if required), but also localisation for statutory and commercial practices, and ongoing quality control.

Product Strategy

CRM by HansaWorld's advanced and successful user interface was first developed for Apple Macintosh in 1988. In 1994, when the program was ported to Windows, it had already been proved by thousands of users. HansaWorld's experience with international sales and modern technology puts it in the perfect position to meet the challenges of the next decade.

HansaWorld provides a wide range of technologies for e-business including internal and external email, several webshop solutions and PDA support. In addition, HansaWorld can help to build a corporate portal. CRM by HansaWorld is developed using C++ as its programming language, and proprietary technology for database design and for network communication. This allows HansaWorld to have the same products available for several different operating systems, each version optimised for maximum performance.

Currently CRM by HansaWorld is available for Windows 2000-XP, including Windows CE, Mac OSX, Linux and AIX, Symbian S60 and iPhone.

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