

Customer Relationship Management – CRM

CRM Project Management Administration Welcome Vane Spasov

Search

Enterprise Address 1 Phone
Location Address 2 Email
Zip / City Web
Country

Details Contacts Team **Quotations** Journal

Offers Orders Leads Lost

Quotation No	Information	Status	Quotation Date	Deadline	Total SP	Sign	Action
LEAD-2005	Oracle 9i	Suggestion	01.04.2005	01.05.2005	0	VS	
11-2004/A	Onsite Support	Detailed Offer	01.01.2004	01.02.2004	14	VS	
12-2004/G	High Bay Extension	Final Round	10.02.2004	31.03.2004	14	VS	

Done Local intranet

Technical white paper

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Table of content

<u>1</u>	<u>SUMMARY</u>	<u>3</u>
<u>2</u>	<u>INTRODUCTION.....</u>	<u>4</u>
<u>3</u>	<u>WHAT IS ULCRM</u>	<u>4</u>
3.1	ULCRM ACCESS AND SECURITY	5
3.2	DETAILS.....	5
3.3	CONTACTS.....	6
3.4	QUOTATION.....	7
3.5	CONTACT MANAGEMENT - DETAILS.....	8
3.6	CONTACT MANAGEMENT - LOCATION	9
3.7	CONTACT MANAGEMENT - FUNCTION.....	9
<u>4</u>	<u>ULCRM ADMINISTRATION AND CUSTOMIZATION.....</u>	<u>10</u>
4.1	ADMINISTRATION: USERS	10
4.2	ADMINISTRATION: CRM.....	11
4.3	ACCESS RIGHTS	11
4.4	LANGUAGE	12
4.5	LOCATION	13
4.6	LOGIN	13
<u>5</u>	<u>BENEFITS OF ULCRM</u>	<u>14</u>

1 Summary

Customer Relationship Management is the business strategy that aims to understand, anticipate, manage and personalize the needs of an organization's current and potential customers. Our uCRM system gives such opportunity to care about costumers and makes them pleased with the cooperation they have with the organizations that uses our CRM sollution.

2 Introduction

uCRM stands for Unilog¹ Customer Relationship Management. It is web-based application which main purpose is customer relationship management. Customer Relationship Management or CRM refers to business practices implemented across an enterprise to organize the acquisition, aggregation, and analysis of customer profiles. This is done for only purpose - good customer relation, which brings better cooperation between the company and its customers, associates, business contacts etc.

Today when looking into the world of Customer Relationship Management you can find great number of different definitions in use. For example "CRM is an integrated approach to identifying, acquiring, and retaining customers", or "CRM is an information industry term for methodologies, software, and usually Internet capabilities that help an enterprise manage customer relationships in an organized way" or "CRM are those aspects of a business strategy which relate to techniques and methods for attracting and retaining customers".

Ever noticed how some companies seem to be so much better at understanding and servicing their customers than others? These companies use Customer Relationship Management system to streamline and simplify the interaction between their business and their customers. CRM is one of those buzzwords around at the moment. But the reality is that it's been around for many years. Thousands of successful businesses have been using CRM to save them time and money by making their internal processes more efficient.

3 What is uCRM

Our Customer Relationship Management solution or simply uCRM is web-based application that manages the relationship between the company and its customers, associates, clients etc. This system cares about good and efficient cooperation, developing of sincerely and closes relationship, brings trust and makes the company to be wanted from the customer. That is because uCRM has mechanism for collecting information about the contacts that communicate and cooperate with the company. Every contact can be communicated via phone, fax or e-mail. For every occasion that is meaningful to the client such as birthday or some holyday there is way to

¹ **Lazarov Consulting Engineering** previously was known as **Unilog** after the rebranding in 2008

show him/her that the company he/she cooperates thinks about him/her and there is way to express that via gift, card or newsletter, or product from the company. This system can also care about the employees in the company, their function, what they do, what are their assignments, team functions etc.

uICRM is web-based application, it is going to be published on the Internet and everyone can access it. Not yet everyone, but everyone who has username and password to enter the main portal. The uICRM system cares about the level of access rights to the users. Not every one has right to access every page or every menu. Also very important is the Multilanguage support of this system. The whole interface can be viewed on the language that user wants.

3.1 uICRM access and security

For starting using uICRM the user need to login. The Login screen is shown on Figure 3-1. When user enters the main screen, depending on his access rights and depending on which group of users belongs, appropriate menus and pages will be displayed. If the user belongs to the Administrator user group he can enter on every portal and can change data. If user belongs to other user group he is restricted to see only those portals and menus which are given from the Administrator. For example he can have only read right access to some portals where he can see the data about the contacts that communicate with the company.



Figure 3-1 Login screen

3.2 Details

First screen after logging gives opportunity to navigate through the pages and manus that are accessible for the current user.

The uCRM system is constructed for gathering information about the enterprises/companies that cooperate with the company owner of the uCRM. This information can be retrieved from the search dialog for all companies and their locations. Then is given detailed information about business occupation, industry branch and product groups of the selected enterprise on selected location. See Figure 3-2.

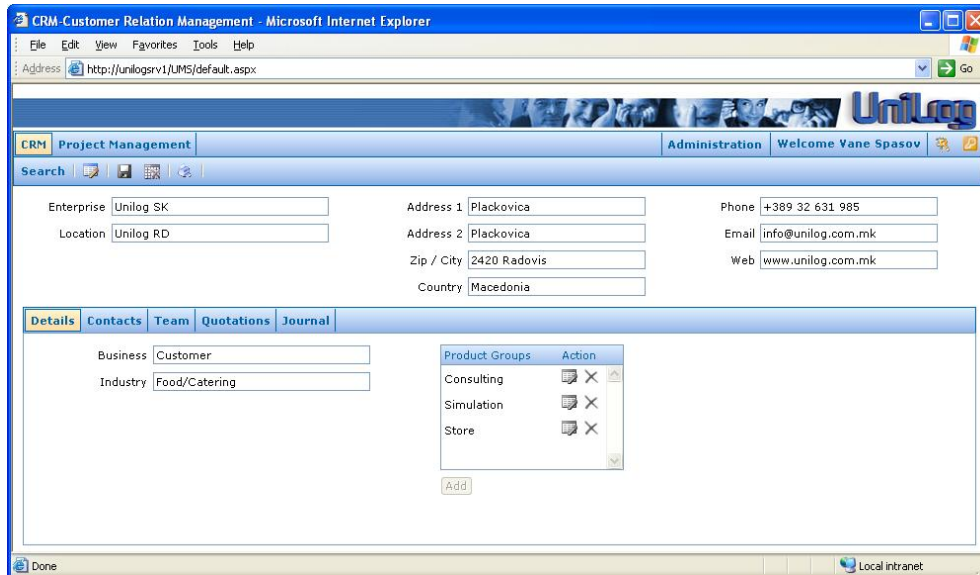


Figure 3-2 Details screen

3.3 Contacts

Other important part of uCRM is information about the contacts (clients) that work on the selected enterprise and location. There is also information about the name of the contact person, his position in the enterprise, his title, his function, his phone, his mobile and his e-mail. This is represented in the Figure 3-3. There is also opportunity to manipulate with data about the employees that are assigned to work in teams.

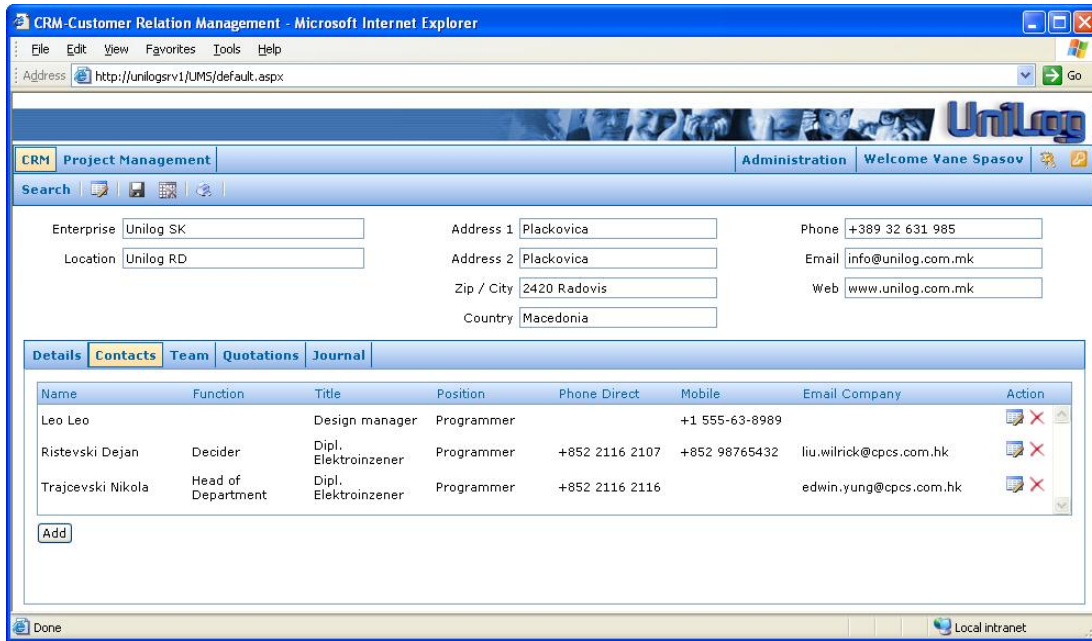


Figure 3-3 Contacts

3.4 Quotation

When is talking about business there is always to offer something to sell or something to buy. uCRM system is also responsible for storing data about offers and orders of the company clients, if they were manufacturers or if they were customers, in one name they are clients and every important data about products quotation is collected and is shown in four different tab pages:

- **Offers** - Enterprise on given location offers product with its quotation number, information about it, quotation date, deadline, total SP and status;
- **Orders** - Enterprise on given location orders product with its quotation number, information about it, quotation date, go live date, total SP and margin;
- **Leads** – there is data for quotation number, information about it, quotation date, deadline and go live date;
- **Lost** - there is data for quotation number, information about it, lost date and the reason for losing the product.

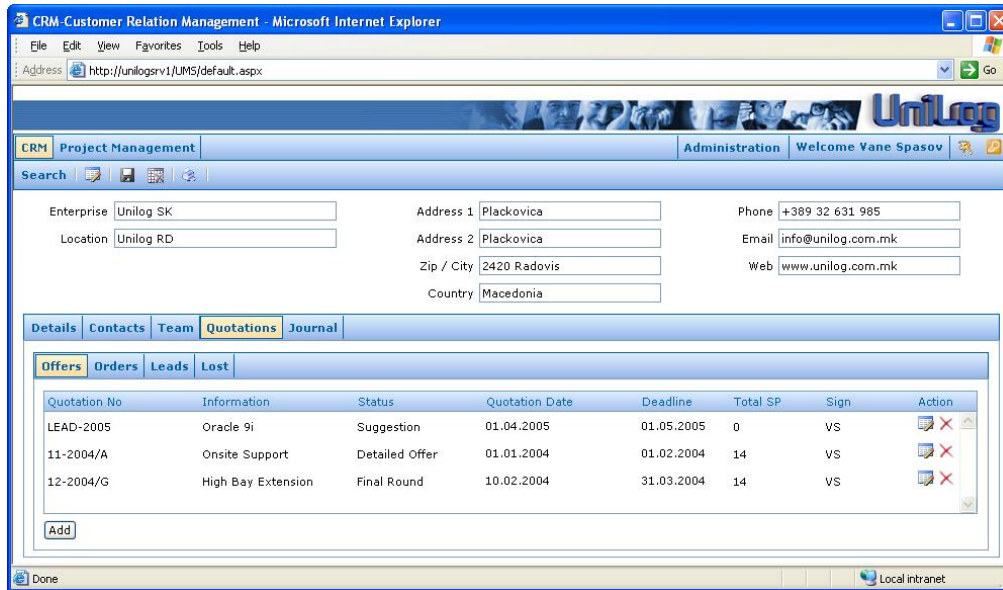


Figure 3-4 Quotation (offers, orders, leads and lost)

3.5 Contact Management - Details

The contact management portal is shown on Figure 3-5. On this portal the users' data like users' first name, last name, birth date, sex, salutation, nationality, home town, title, position and language is entered into database. Here users can chose the appropriate language and whole interface of the application will be shown on that language. For now the uCRM has 3 translations: English, German and Macedonian language. Adding additional languages is very simple and can be done by the administrator.

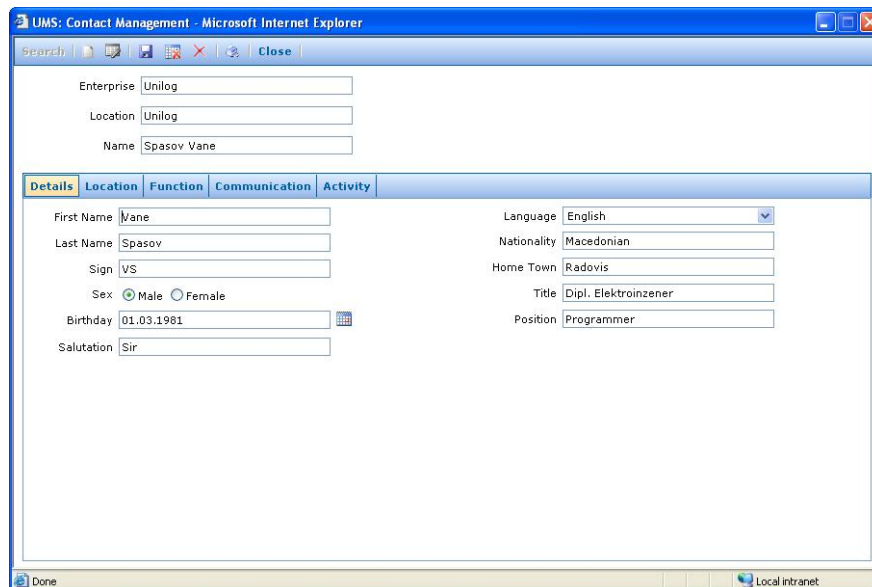


Figure 3-5 Contact Management-Details

3.6 Contact Management - Location

One enterprise can have many locations, and the user belong to some of them. That locations are manages through the page shown on Figure 3-6.

UWS: Contact Management - Microsoft Internet Explorer

Search | Close

Enterprise Unilog

Location Unilog

Name Spasov Vane

Details Location Function Communication Activity

Enterprise Unilog

Location Unilog

BusinessUnit Development

Address 1 Kopernikova

Address 2 spasovden

PostalCode 02

City Skopje

State / Region MKD

Country Switzerland

Done Local Intranet

Figure 3-6 Contact Management-Location

3.7 Contact Management - Function

The uCRM system has opportunity to manage contact function in the enterprise he works. That is for example he can have one or several functions that he does, like Head of Department and Account Manager and only one of his functions can be his main function. This kind of data is manipulated by using the page/portal designed for that purpose. See Figure 3-7.

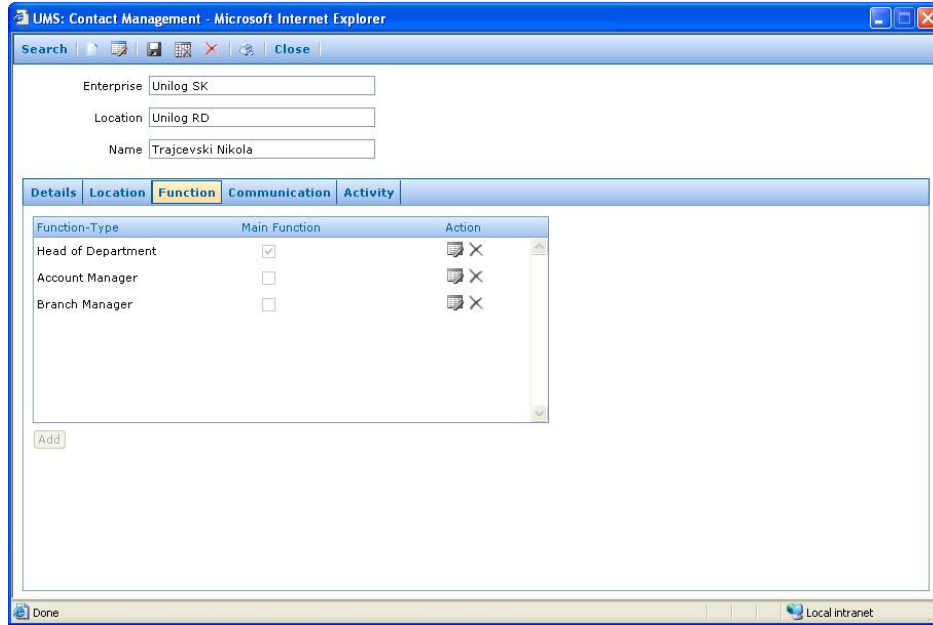


Figure 3-7 Contact Management-Function

4 uICRM administration and customization

If user has access right to the administration menus he can access to the pages/portals that enable administration and customization of the application. The access rights are applicable also to administration menus and portals, thus enabling user groups with different administration privileges.

4.1 Administration: Users

Some of available administration menus are shown on Figure 4-1. The users' submenu is shown with the links to the user group, roles and access right pages/portals. By clicking on one link the page is opened and the user according to his access rights can manipulate with data on the opened page.

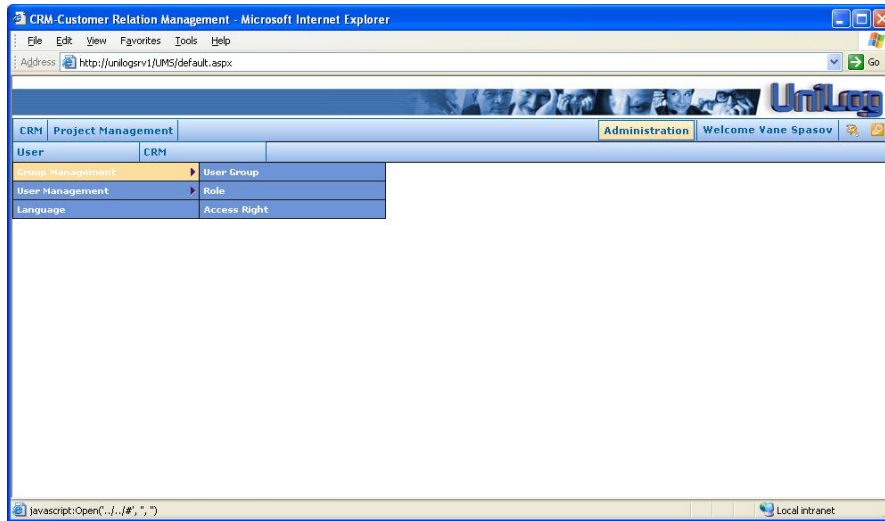


Figure 4-1 Administration

4.2 Administration: CRM

The CRM administration submenu is shown on Figure 4-2. Here are given links to pages that are responsible for administration on appropriate data such as product group, industry, business relation, business unit, enterprise, location type, location, team function etc.

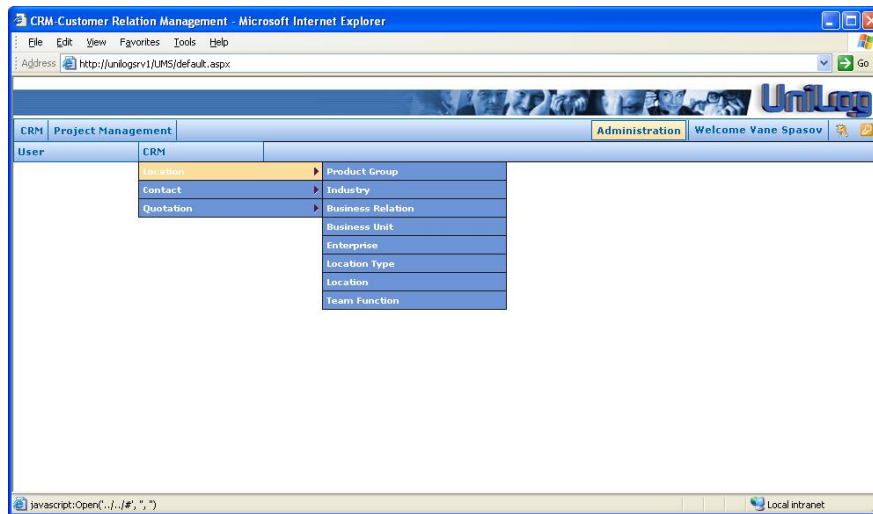


Figure 4-2 Administration CRM

4.3 Access Rights

One of the most important in the uCRM system is data security for all the contacts that are inserted into the data base. Not everyone can see

everything of the uCRM system data. Not every menu, not every page is available for everyone. There exists user groups and every group has appropriate privileges (access rights). User according to which group belongs can read or read/write to the page. For these actions exists pages which purpose is managing the user groups (Figure 4-3), and page that gives the access rights to the user group (Figure 4-4).



Figure 4-3 User Group management

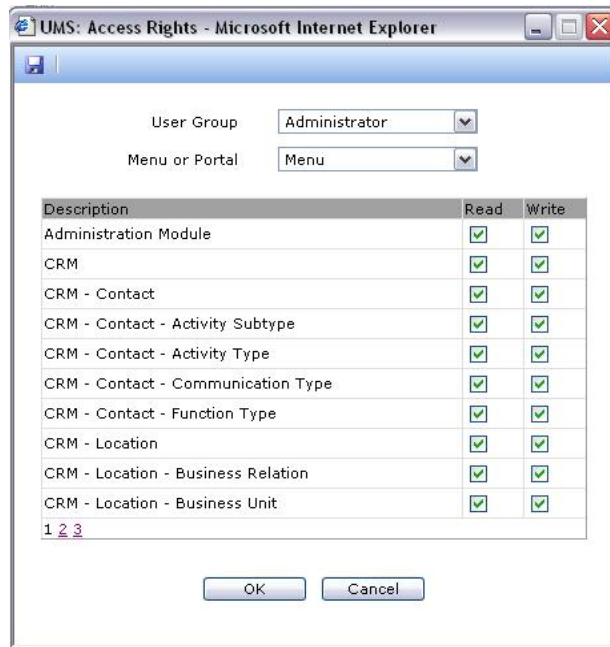


Figure 4-4 Access rights management

4.4 Language

If security and access rights are the first and primary goal of the uCRM the language support is the second thing that makes uCRM usable in more than one talking and understandable language. The uCRM system has ability the whole interface to be translated in any language the user wants, it must be said that every word that is displayed on any page can be represented on the language user wants. For now the uCRM system works with three languages:

English, German and Macedonian. Adding additional languages is through page shown on Figure 4-5.

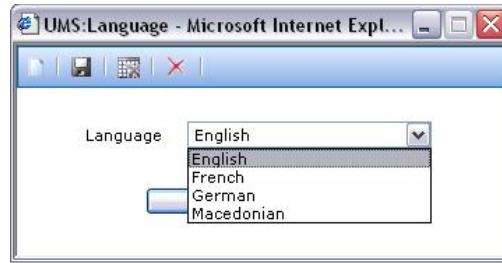


Figure 4-5 Language administration

4.5 Location

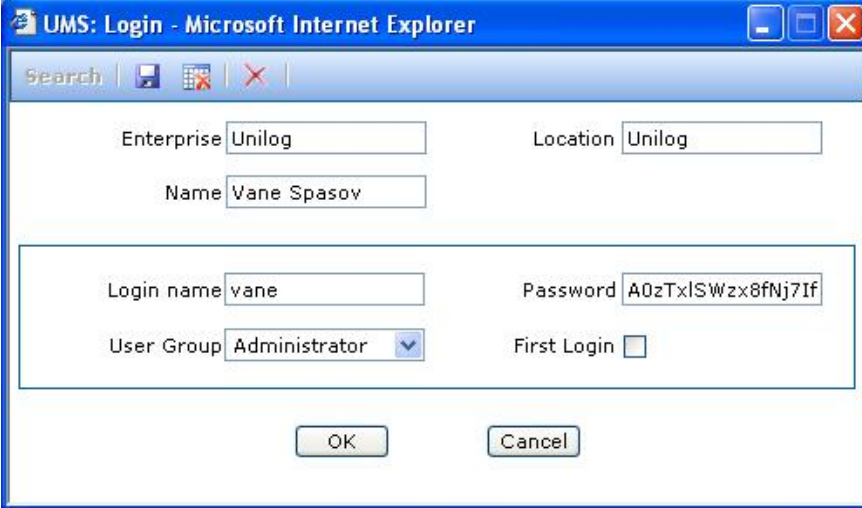
Company that owns the uICRM system will need information and data about all its clients and their companies, where are they spread, all locations where the clients company has representations for example the location can be of type headquarter, or branch, or subsidiary, or something else. All data that is connected to the location is manipulated (inserted, modified or deleted) using the page shown on Figure 4-6.

Enterprise	Unilog	Location Type	Headquarter
Location	Unilog	Address 1	Ilindenska 57/8
		Address 2	Ilindenska 57/8
		ZIP	1000
		City	Skopje
		State	Macedonia
		Country	Macedonia
		Industry	Education
		Business Relation	Manufacturer
Phone	+ 389 2 3223 754		
Email	info@unilog.com.mk		
Web	www.unilog.com.mk		

Figure 4-6 Administration of users' location

4.6 Login

User is maximally protected by encrypting his password to the uCRM system. On this page user can insert or change his login name, the user is added to one of the user groups and all of this is done when contact is added first. After that the contact can take username and password.



The screenshot shows a web browser window titled "UMS: Login - Microsoft Internet Explorer". The browser's address bar contains "Search |" followed by navigation icons. The main content area is a form with the following fields:

- Enterprise: Unilog
- Location: Unilog
- Name: Vane Spasov
- Login name: vane
- Password: A0zTxISWzx8fNj7If
- User Group: Administrator (dropdown menu)
- First Login:

At the bottom of the form are two buttons: "OK" and "Cancel".

Figure 4-7 Administration of users' login

5 Benefits of uCRM

The main benefits of our CRM solution are:

- This Customer Relationship Management system is responsible for security of data for all contacts and clients of the company. This data is protected by giving different access rights to every user.
- The Multilanguage support. That is every user can choose on what language can see the portals. While one user is logged with English language support other can be logged with German language support or Macedonian or some other language user wants. If some language is not yet inserted into the data base that can be done very easy and very quickly. And every translation is also possible and quickly.
- Enhanced security management. It is very easily to create new user groups and to assign access rights for every web page.
- Windows XP like user interface. The user interface is very similar to standard Windows XP user interface making it easily to use for new users.
- Based on industry standard Microsoft .NET platform.