# CRM Feature list

| Feature | Description |
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| **Client Mgmt** | |
| **Client Info** | Allow the user to configure the system for one of the following:<br>a) Support both corporate clients and individual (consumer) clients<br>b) Support only corporate clients<br>c) Support only individual (consumer) clients<br><br>Support unique name and multiple alternative names for each client<br><br>Allow the user to click the org chart for the corporate client to drill down to see the parent and its sub-organization info.<br><br>Allow to group different clients together with a user-defined brand name.<br><br>Allow the user to select the following different info pages:<br>General Info \| Contact Info \| Behavior Info \|<br>Value Info \| Legal Info \| Financial Info \|<br>Special Info \| Membership \| Privilege Info<br><br>Allow the user to define different sections, fields and field locations in the client general info page. Basically the user can design the layout of client general info page.<br><br>Allow to record contact info of different contact types, different contact methods and different contact addresses for different purposes (e.g., invoice, shipment, service and payment ).<br><br>Allow user-defined client qualification criteria and methods.<br><br>Allow to assign people to different service roles relationship manager, sales rep, account manager, delivery manager and service rep to service the client<br><br>Allow to log all product-based or requirement-based interest and marketing info of the client.<br><br>Allow to log all opportunities and progresses of the client.<br><br>Allow to log all interaction and transaction info of the client.<br><br>Allow to log all service info of the client.<br><br>Allow the user to define the fields and scoring methods representing the value of the client and the value score for each client will be automatically calculated. |
| **Lead Mgmt** | Support quick recording or importing lead info<br><br>Support auto assignment of leads to sales reps based on pre-defined rules.<br><br>Support public pool for the leads that have been removed from the sales reps and are up for grabs<br><br>Support user-defined qualification criteria and scoring method. |
| **Conversion Mgmt** | Allow to track conversions such as lead to first-time-client, first-time-client to repeated-client, repeated-client to reference-able client and active-client to inactive-client. |

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| **Search & Data Mining** | Provide basic search based on fields such as size, region and industry defined in the general info page.<br><br>Provide advanced search based on fields defined in the following categories:<br>a) General,<br>b) Responsible Parties<br>c) Interest<br>d) Value<br>e) Interaction<br>f) Behavioral<br>g) Special info |
| **Related Party Mgmt** | Client is also a supplier:<br>Allow a client is also a supplier and/or partner and two-way transaction information will be recorded in the related but separate pages.<br>Client's clients:<br>Allow to identify and record the info of client's clients. This info is very useful for certain business such as logistics.<br>Client's related entities:<br>Allow to identify and record the info of client's related entities (e.g. subsidiary or parent company). |
| **Abandon & Blacklist Mgmt** | Manage the abandoned and blacklist clients |
| **Alert Mgmt** | Allow the user to set the follow sets of alert rules:<br>a) Lead without qualification<br>b) Lead without sales rep<br>c) Lead without interaction<br>d) Lead with no follow-up action<br>e) Initial client interact date<br>f) Lead with no change of status (e.g., for prolonged period of time)<br>g) Qualified lead has zero opportunity<br>h) Lead/client has more than N open opportunities<br>i) Existing client without account manager<br>j) Sales rep has created less/more than N leads<br>k) Client value care alert |
| **Standard Reports** | a) New lead report<br>b) Lead qualification exception report<br>c) Lead progress report<br>d) Client progress report<br>e) Sales stage progress report<br>f) Group performance report<br>g) Sales volume report – multiple client<br>h) Membership report<br>i) Member purchase report<br>j) Member quantity report |
| **Import & Export** | Support batch import and update of massive client records.<br><br>Support export of client info to Excel or PDF. |
| **Access Privilege Mgmt** | **Record level access control:**<br>a) Provide access control by enterprise-wide, group-wide and individual client.<br>b) Allow different roles/users to access the following different parts of client info:<br>- Campaign<br>- Opportunity<br>- Contract<br>- Order<br>- Invoice<br>- Payment<br>- Service Ticket<br>c) Allow the manager to view subordinates' client info.<br><br>**Field level access control:**<br>a) Interaction<br>b) Revenue |

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| **Audit Trail** | Provide audit trail on client info changes. |
| **Client Self-service via Website** | |
| **Open Portal for Client** | Provide a portal for the client to login to process the following on line:<br>a) Submit service tickets to their service rep and track the resolving status.<br>b) Search and view documents from library<br>c) Set delegate for a period of time |
| **Marketing Campaign Mgmt** | |
| **Campaign Planning** | Allow the user to specify the campaign basic info such as name, id, type, responsible parties, schedule and approval flow.<br><br>Allow the user to specify the following promotion info:<br>a) Theme<br>b) Marketing topics<br>c) Audience<br>d) Key message<br>e) Product, product family or others<br>f) Promotion offer and terms<br><br>Track the following investment and return:<br>a) Campaign budget<br>b) Expected results which can be one of the following:<br>- # of leads<br>- # of qualified leads<br>- # of sales opportunities<br>- Amount of revenue<br>- Others<br>c) Expected return date<br><br>Support pre-defined templates for quick creation of campaign project schedule<br><br>Support full budget planning and tracking<br><br>Support user-defined campaign approval flow |
| | Support the following campaign execution channels:<br>a) Email<br>b) SMS,<br>c) Telephone,<br>d) FAX<br>e) Regular mail<br><br>Support content mgmt:<br>a) Content template<br>b) Content variation<br>c) Selection of contents for personalization<br><br>Support content editing with HTML, CSS, picture insertion, hyperlink, attachments etc.<br><br>Target audience can be identified by region, industry, interest area, marketing topic.  Target audience can also be further filtered by contact’s personal info such as age, marital status, education level, salary range etc. |

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| **Campaign Preparation** | Provide sophisticated search mechanism based on fields defined in the following categories for the user to identify the massive campaign targets from the database<br>a) General<br>b) Responsible Parties<br>c) Interest<br>d) Value<br>e) Interaction<br>f) Behavioral<br>g) Special info<br>Also, recipient lists in Excel or CVS format can be imported to formulate the target list.<br><br>Support content personalization at the following two levels:<br>(a) The user can send specific content to a particular type of receipts<br>(b) Each receipt in a particular type of receipts can receive a unique content<br><br>For eMarketing (email and SMS), both fully automated and manual methods are supported. For the fully automated execution, the user can pre-set scheduled send time and batches.<br><br>Support to pre-set execution rules to automatically send out customer caring emails/SMS messages on client 's important dates such as birthday, anniversary etc.<br><br>Automatic tracking of eMarketing execution results:<br>Allow the user to view email/SMS are successfully sent, opened or clicked-through; if the sending failed, the system will provide failure reason for analysis; opt out records are also provided. |
| **Campaign Execution** | Multiple campaigns can be executed and tracked in parallel<br><br>Provide project mgmt as add-on for campaign project mgmt and event mgmt.<br><br>Provide campaign alerts notification, include issue, risk, budget updated, budget overrun, target achievement etc. to remind responsible people of their campaign work.<br><br>Provide real-time business map and dashboards for the executives to view the campaign execution conditions.<br><br>Provide issue and risk records for the marketing team to know about the campaign conditions.<br><br>Able to track the target results and non-target results (side benefits) of the campaign.<br><br>Able to track investment and return in real-time and the user can drill down to view details<br><br>Able to compare campaign budget and actual cost and generate cost overrun warning in real-time.<br><br>Support Reality Checks and eSurvey questionnaires for the brand popularity, audience's feedback etc. |
| **Campaign Performance Evaluation** | Provide real-time budget-vs-actual and cost-benefit & ROI analysis with breakdown by cost classification, channel, subentity, line-of-business, product and responsible person. Also, provide the following detailed reports:<br>a) eDM interim results (e.g., email sent, email opened and email read)<br>b) Other campaign interim results (e.g., visitors, members, leads, opportunities, transactions)<br>c) Campaign final results<br>d) Campaign status summaries |
| **Sales Mgmt** | |
| | Allow user-defined sales stages and funnel measures<br><br>Support automatically allocation of sales reps to new clients based on industry and region.<br><br>Allow to create sales assignment in sales calendar. |

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| **Sales Planning** | Support scheduling sales meeting and visit arrangement.<br><br>Provide automatic alert to remind scheduled activities.<br><br>Supports automatically tracking activity result<br><br>Provide client interaction mgmt on the followings:<br>a) Interaction purpose<br>b) Schedule<br>c) Sales stage<br>d) Interaction type<br>e) Key decision makers<br>f) Result<br>g) Follow-up actions |
| **Opportunity Mgmt** | Allow the user to enter the following opportunity info:<br>a) Name and ID<br>b) Description<br>c) Responsible parties<br>d) Client info<br>e) Investment and return<br>f) Schedule<br>g) Priority<br><br>Allow user-define fields for info recording, search and listing.<br><br>Support competition, value proposition, influencer and leverage analysis.<br><br>Support cost budgeting and tracking.<br><br>Support info sharing for team selling.<br><br>Support ROI analysis, competition analysis, automatic GP and GP rate calculation.<br><br>Support management review for prioritization<br><br>Allow user-defined approval flow<br><br>Support action plan and assignment tracking.<br><br>Support response to tender management<br><br>Support real-time progress tracking<br><br>Provide the following real-time reports:<br>a) Investment attention<br>b) Cost & return<br>c) Expected vs. actual<br>d) Funnel analysis<br>e) Status summaries<br><br>Provide project mgmt as add-on to allow sales project mgmt for large or complex opportunities<br><br>Support automatically generation of sales order or contract from a successful opportunity |
| **Quotation Mgmt** | Support quotation management:<br>a) Easy of quotation creation based on info in product master<br>b) Metrics-based authorization and allow user-defined quotation approval flow based on department/team<br>c) Track quotations sent to client<br>d) Allow automatic conversion of quotation to sales contract or order<br><br>Support quotation print-settings and export to Excel or PDF |

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| **Order Mgmt for Consumer Products** | Provide order management for consumer products:<br>a) Quick order creation based on info in product master or one-time products<br>b) Metrics-based authorization and allow user-defined quotation approval flow based on department/team<br>c) Track orders in different status, including planned, official and closed<br>d) Automatic linkage between request from inventory & receive from inventory with shipping arrangement in order<br>e) Quick track of goods return<br>f) Support satisfaction check for each order<br><br>Support order print-settings and export to Excel or PDF |
| **Contract Mgmt for Sophisticated Products** | Provide contract management for consumer products:<br>a) Easy creation of contracts based on fixed price or time & materials<br>b) Metrics-based authorization and allow user-defined quotation approval flow based on department/team<br>c) Provide sophisticated Bill of Material function in contract, such as version definition and comparison, approval flow/stages settings and link with inventory, etc.<br>d) Allow contract payment to be triggered by time or completion of project milestones<br>e) Support automatic contract renewal or provide contract renewal reminder for manual renewal<br><br>Support Service Level Agreement management in contract:<br>a) Flexible user-defined measurement types<br>b) Easy definition of target type, reward type and buffer type and penalty type<br>c) Automatic link with project milestones/user-defined milestones for SLA measures<br>d) Automatic calculation and monitoring of actual result and gap between target and result<br>e) Easily track SLA target & result on one screen<br><br>Support user-defined contract template and export to Excel or PDF in a user-defined format<br><br>Support change approval before allowing to change the contents of an approved contract.<br><br>Support version control in contract. |
| **Revenue Budgeting, Sales Quota & Commission Mgmt** | Easy allocation of sales quota to different salesmen/sales teams/departments by batch input for each revenue item<br><br>Quick monitoring of sales quota achievement of each salesmen/team as well as achievement percentage based on quota<br><br>Support drill-down of figure to view details of sales orders/contracts<br><br>Support setting annual, quarterly and monthly sales targets and quota for specific sales representatives in specific groups.<br><br>The achieved quota of each sales representative or group can be tracked in real-time.<br><br>Support KPI Mgmt and real-time variance tracking of quota and achieved quota.<br><br>Provide flexible commission calculation based on either a user-defined commission program or commission input in each order/contract<br><br>Support tracking of sales commission achievement based on month/quarter/year. |
| **Revenue Pipeline Mgmt** | Provide pipeline management with flexibility to count % of confidence level from sales opportunities:<br>a) Automatic tracking of payment received and outstanding invoice based on quarters on one screen<br>b) Provide drill-down of figures to show details of payment received/outstanding invoices<br>c) Automatic aggregation of revenue pipeline information to from subgroups to headquarters<br>d) Out-of-box pipeline display components, including pipeline bar chart and pipeline trend graph |
| **Invoicing and Payment** | Provide convenient invoicing and payment functions:<br>a) Automatic generation of invoice based on payment terms<br>b) Batch handling of invoices to a client/contract<br>c) Batching handling of payment received from client to settle multiple invoices of a client for different orders/contracts<br>d) Automatic linkage between invoice and payment<br>e) Provide invoicing alert based on payment terms<br>f) Provide detailed tracking report for invoice and payment |

| Product Mgmt | |
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| **Product Master** | Allow user-defined product types, families, sub-families and brands<br><br>Support auto generation of product ID based on user-defined rules.<br><br>Support both global product view and group-oriented product view and access control.<br><br>Able to store and maintain product info such as product type, product family, product name, product ID, product supplier, product price info in Product Master<br><br>Flexible to add user-defined fields in the product basic info page.<br><br>Support packaging specification and quantity control.<br><br>Support product costing based on purchase price or manufacturing cost.<br><br>Support product pricing based on cost plus margin or list price minor discount.<br><br>Support multiple price and discount rules based on client type and volume.<br><br>Able to record up & cross sell product info.<br><br>Provide inventory mgmt:<br>a) Track demand from sales orders<br>b) Track supply from shipment info<br>c) Track inventory movement and current quantity<br>d) Support periodical stock check<br><br>Support serial number or other identification mgmt<br><br>Allow user-defined product approval flow. |
| **Product Analysis & Evaluations** | Allow to analysis:<br>Client<br># of Clients<br># of First Time Clients<br>Average Period Between Transactions<br>% of Inactive Client<br>Marketing<br>Total # of Campaigns<br>Campaign Generated # of Email<br>Campaign Generated # of Leads<br>Campaign Generated # of Qualified Leads<br>Campaign Generated # of Opportunities<br>Campaign Generated Revenue<br>Campaign Cost<br>Campaign ROI<br>Presale<br>No Presale Interaction Duration<br>No Presale Progress Duration<br>Potential Revenue<br>Presale Cost<br>Presale ROI<br>Presale Confidence |

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| **Product Analysis & Evaluations** | Contract/Order<br>Contract/Order Revenue<br>Contract/Order Cost<br>Contract/Order Gross Profit<br>Contract/Order GP Rate<br>Contract/Order Payment Cycle<br>Product<br>Total Product Revenue<br>Total Product Cost<br>Gross Profit<br>GP Rate<br>Average Product Unit Price<br>Average Product Unit Cost<br>Average Product Presale Cycle<br>Interaction<br>Total #<br>No Client Interaction Duration<br>Action<br>Total #<br>Service Ticket<br>Total #<br>Personalized Service Request<br>Total # |
| **Product BOM** | Provide BOM for managing the creation of a product from raw and WIP materials or a bundled product from sub-products. The materials and/or sub-products are specified as product's components and offspring.<br><br>Every component can be selected from Product Master and the system will automatically carry the component info such as name, ID, model, price to the BOM.<br><br>Provide visualized tree structure of the product BOM and allow the user to edit it easily.<br><br>Allow to import BOM info from template to create product BOM without the need to rekey in the info.<br><br>Product BOM can be linked to opportunity, contract and project (if project mgmt is used as add-on). |
| **Membership & Loyalty Mgmt** | |
| **Design Your Own Membership and Loyalty Program** | Allow user-defined different programs and different types of membership within each program.<br><br>Allow user-defined membership numbering rules and reserved membership numbers (e.g., 888) for VIP in each program.<br><br>Allow user-defined award and promotion rules for different types of memberships, different geographical locations, different time periods, different products and different awards (e.g., gifts, coupons, discounts and points) in each program.<br><br>Allow user-defined aging and redemption rules for membership points in each program.<br><br>Support membership creation, upgrade and termination in each program.<br><br>Support membership card and membership fee management.<br><br>Support interface to POS to record all transactions for each member.<br><br>Auto customer care on special events (e.g., birthday, anniversary) and auto notification on special promotions. |
| **Membership Self-service** | Web-based member self-service to allow members to view their transaction and accumulated point summary and use their points to exchange the awards that they want. |

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| **Analysing Reports** | The membership & Loyalty management reports include:<br>Member Consumption Summary Report<br>Member Quantity Statistic Report<br>Member Consumption Characteristic Report<br>Member Consumption Credit Report |
| **Client Service Mgmt** | |
| **Service Ticket Mgmt** | Allow user-defined service types and sub-types<br><br>Support service ticket basic info such as subject, ID, requestor, use urgency, impact severity and required time.<br><br>Allow clients to submit calls such as questions, inquiries, complaints and incidents to the service desk and allow the service desk to reply and follow up the calls.<br><br>Allow the service desk to find out contract, product, warranty and service level info via product serial # or contract ID provided by clients<br><br>Allow the service desk to communicate to the client in real-time.<br><br>Allow the service desk to assign the service ticket to the appropriate team based on the service type and allow the responsible team to schedule and assign actions<br><br>Track actions and acceptance against service level and send out alerts when possible deviation is detected.<br><br>Allow clients to escalate calls to service manager<br><br>Allow multiple sub service tickets within a service ticket. |
| **Knowledge Base** | Provide framework for building up knowledge base.<br><br>Allow easy access of knowledge from the knowledge base. |
| **eSurvey for Client Satisfaction** | Support user-defined questions and scoring methods in eSurvey<br><br>Allow clients to participate eSurvey online and auto calculate the scores. |
| **Reports** | Provide detailed service ticket report by:<br>a) Requested organization<br>b) Responsible organization<br>c) Product<br>d) Service type<br>e) Time (Year/Quarter/Month/Week/Day)<br><br>Provide service ticket summary of the following info by (i) client and (ii) service rep:<br>a) Total number of service tickets<br>b) Number of service tickets resolved<br>c) Number of service tickets not yet resolved<br>d) Number of service tickets escalated<br>e) Average service ticket resolution time<br><br>Provide trend graph to summarize the total number of service ticket for the specified period |
| **Outlook Integration** | |
| **Client Info** | Support creation of client and client contact via emails received by outlook by few clicks.<br><br>The system can automatically create client and contact triggered by outlook.<br><br>Support showing the contact info of the client in the outlook contact |

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| **Client Interaction** | Support creation of client interaction from emails by few clicks in outlook. The email will be automatically saved as attachment in this interaction in the system.<br><br>Support showing the interaction in the outlook calendar |
| **Assignment** | Assignment can be created in the system to the responsible person who can accept or reject the assignment directly in outlook without logging into the system.<br><br>Support creation of assignment based on emails directly in outlook<br><br>Support showing the assignment in the outlook task module |
| **Approval Events** | Allow approving business items directly in outlook, including:<br>a) Assignment<br>b) Action<br>c) Opportunity |
| **Client Analysis & Embedded BI** | |
| **Client Analysis Reports** | New Lead Report<br>Lead Qualification Exception Report<br>Lead Qualification Report<br>Lead Progress Report<br>Client Progress Report<br>Monthly Client Conversion Chart<br>Client Source Type Chart<br>Top 10 Clients By Revenue Chart |
| **Embedded BI** | Allow to define client behaviour database based on the industry requirements.<br><br>Provide online e-survey to acquire valuable client behaviour data.<br><br>Support automatically collecting client behaviours and updating client behavioural database.<br><br>Provides analysis report based on client behaviours and customized marketing analysis report via multi-dimensional search engine.<br><br>Allow email campaign base on the client analysis results.<br><br>Provide report generator to self-define customized marketing analysis report. |
| **Other Assisting Functions** | |
| **Sales Expense Mgmt** | Trip or expense request and approval flow<br><br>Expense advance and approval flow<br><br>Expense report and approval flow<br><br>Expense request, expense advance and expense report auto linking and netting<br><br>Bursar and reimbursement mgmt |