Atronics Extended CRM

Atronics Consulting has been installing and supporting Business and Accounting Software as well as Client Relationship Management (CRM) systems for many years. Now, extended CRM functionality is now fully integrated with Jiwa Financials and Microsoft Outlook. We have achieved what many of our clients have asked for… "*A highly functional and affordable CRM system that works with my accounting software and my Outlook"*.

Atronics Extended CRM provides deep integration between Jiwa Financials and Microsoft Outlook to increase the speed and efficiency of communicating with all the companies and contacts that your organisation deals with. It provides a company centric view of data with fast access to the "who, what, when". Now all your organisation's team members can have access to all the information they need. *e.g. Sales staff can see a customer's credit status, previous purchases, quotes, sales calls made, to-do's, e-mails etc.*

At the heart of the program is a company navigation tree that allows you to drill down quickly to locate the company of interest or contact person within that company. Companies are divided into Debtors, Creditors and Prospects. Debtors and Creditors can be divided further into Classifications and Groups. Prospects can be divided into used defined subsets. Simply navigate to and click on the company of choice to display all relevant data for this company.

Company data is displayed in two tabs. An events tab and a products tab, each of these in turn display two grids of data. The events tab shows a company events grid and a contacts events grid.

The company events grid contains the following lines:

- Company Details – AccountNo, phone, fax, email address, etc
- Company Status – A summary of the financial status
- Sales Orders
- Quotations
- Purchase Orders
- Payments
- ToDo's
- Notes

Double clicking on any line displays the full details of the line and enables it to be printed or emailed.

Expanding the navigation tree node for the company exposes all the recorded contacts for this company. On selecting a contact, the contacts grid shows the following lines:

- Contact Details – phone, email address, etc
- Emails

Double click the line to display the full details which can be printed or emailed.
Right clicking on a company navigation tree node presents a menu of items for that company. These include:

- Company Details – Select this item to update company information such as phone, fax, email address, postal address, etc. This can also be used to add new prospects. Administrators can add additional custom fields per company
- Note – Select this item to record a note against the company.
- ToDo – Select this item (scheduled follow up call, brochure request, sales call etc.) to record a ToDo task relating to this company.

Details entered are automatically saved in Jiwa.

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Right clicking on a contact navigation tree node presents a menu of items for that contact. These include:

- Contact Details – Select this item to update contact information such as phone, email address, etc. This can also be used to add or delete contacts for the selected company. Details are saved in Jiwa.
- Email – Select this item to send an email to the contact. Details are saved in Outlook.
- Appointment – Select this item to create an Outlook appointment.

The right of the main screen shows a task list. This displays for the user that is logged in, a list of all their Todo's, appointments, meetings, events and tasks. Priority items are highlighted. A Task Manager button enables the user to tick off tasks as they are completed.

The company products tab provides two additional grids of data plus a product query facility. The first grid is a sales history grid. This shows a sales summary line for each product sold since a specified date, summarizing the sales quantity, value, etc. This grid can be sorted by a variety of settings. Double clicking on a line will show a report of all sales orders for this product / company. If the navigation tree has a creditor selected, the grid will show all products where that creditor is the default supplier and include sales to all companies.

The second grid shows a product line for each active transaction. Transactions include:

- Quotations
- Un-processed Orders
- Back Orders
- Reserve Orders
- Forward Orders
- Purchase Orders
- Shipments

Double clicking on the line will display the details of the relevant transaction, i.e., sales order, purchase order, etc.

The product query facility enables the user to select a PartNo, quantity and warehouse. It then displays the price for that company (as set up in Jiwa), the stock on hand and when additional stock is expected. *A very fast way to answer "What is my price for that, and when will you have it?"*

A security system saves all confidential data regarding connections and passwords in an encrypted form and allows users to be allocated roles. The security options per role provide complete control on who can see what so that confidential information is not exposed to unauthorized personnel. *e.g. Limit sales staff access to debtor information, inventory margins or costs, but grant wide access to other data.*

To encourage the company wide use of Atronics Extended CRM, licensing is on a per site. There is no limit to the number of companies or users. Also, no Jiwa licenses are required. A site license costs $5,000 plus GST. There is an annual maintenance fee of $1,000.00 plus GST.

The use of Atronics Extended CRM is not limited to sales people. It is a powerful productivity tool for management, sales staff, marketing, accounts payable and accounts receivable personnel.

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