

CUSTOMER RELATIONSHIP MANAGEMENT

OBJECTIVE

Combine ERP, Sales, Marketing and Customer Service to best manage prospect, customer and supplier relations.

OVERVIEW

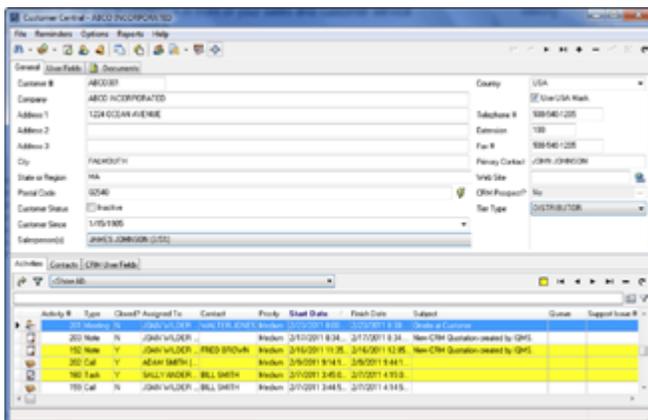
The DELMIAworks Customer Relationship Management (CRM) program provides your employees with the information and tools they need to deliver an exceptional customer and supplier experience. Whether it is Sales, Marketing or Customer Service, CRM allows you to optimize the time spent on developing and maintaining successful relationships and maximizing opportunities.

Because CRM is embedded into the DELMIAworks ERP system, there is no redundant data entry and CRM supports complete access to all ERP related data. CRM allows you to catalog information from initial marketing campaigns and sales contacts through quoting, customer orders, production, shipping, invoicing, payment and RMA cycles.

Synchronize CRM with Microsoft® Outlook to push and pull or create new contact information seamlessly between the programs, as well as log notes and set up calls, meetings and tasks. CRM enables you to capture, manage and track every interaction with customers and suppliers in one place — putting everything in front of your sales and customer service people right when they need it.

KEY BENEFITS

- Track the entire customer and supplier business relationship in a single centralized view
- Proactively manage customer needs and opportunities
- Increase customer service levels
- Gain an overall view of sales and support activities
- Automate routine and repetitive tasks such as mass mailings
- Single database eliminates the need for entry into multiple systems
- Attach documents to various activities for ease of access and viewing
- Cross-synchronize your CRM contacts with Microsoft Outlook



The Customer Central screen provides multiple views of customer activity, offering one-stop access to current and historical data.

"With the tools developed by IQMS, it is much easier to access helpful information and maintain happy customers."
-ProCharger

"CRM makes it simple to track customer information as well as enter and follow-up on sales and marketing activity."
-Apple Rubber Products

CUSTOMER RELATIONSHIP MANAGEMENT: KEY FEATURES

Centralize Prospect, Customer and Supplier Activities

Complete contact management system supports the tracking of all contact activities in one centralized area so current information is available to everyone.

Marketing Support

Create marketing campaigns, send mass mailings (printed or email), create mail merges, track the success and manage the costs of your marketing and advertising campaigns.

Quick Activity Summary

See a snapshot view of prospects, customers and suppliers including contact information, credit status, documents, user defined data and all associated events.

Calendar and Activity Scheduling

All employee events are added automatically to a calendar to make it easier to view employee schedules and create meetings when everyone is available.

Alert Messages

Set automatic alerts for customers, suppliers or contacts and pop-up warnings to immediately notify employees of important issues.

Cross-Synchronize with Microsoft Outlook

Set up new contacts on the fly, create calls, meeting and tasks, or push and pull contact information to and from DELMIAworks and Outlook with the push of a button.

Direct Access to ERP Data

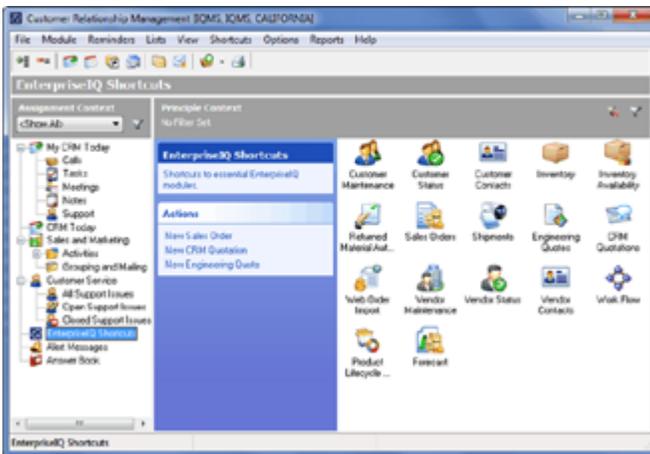
Link directly to all areas related to sales, marketing and customer service, including available-to-promise/capable-to-promise (ATP/CTP), order entry, quoting, credit status and more.

Issue Tracking

Efficiently track customer and supplier issues and monitor responses. CRM provides multiple hierarchical ways to group and sort issues, including automatic distribution lists, for fast and effective responses.

Answer Books

Facilitate quick and accurate customer service responses by creating customized, decision tree based answer books for common problems, employee handbooks and more.



Direct links to key ERP based data, such as sales orders, invoicing, inventory, RMA, shipments and quoting provides your sales, marketing and customer support teams with instant, accurate information.



The mobile ERP application on the Android smartphone means you always stay connected, regardless of your location.

LEARN MORE

To learn more about CRM or if you would like more information on the products and services from DELMIAworks, please visit www.3ds.com/delmiaworks.

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