Customer Information System

Everything about your contacts!
Customer information is the basic to the CRM function.

KIS

Overview

- Comprehensive collection of customer information (electronic document archive)

- Any number of contact persons within one company

- MS-Word as a word processor with easy-to-create standard templates

- Direct sending of mail, fax and letter

- Free assignment of search terms. Data export to MS-Excel

- Report center with evaluations of customer and order data

- Making calls from the application (TAPI interface)

Within RSK-KIS, the contact details of interested parties, customers or suppliers are comprehensively described. Customer information is constantly enriched through daily work and forms the basis for active communication and customer care, sales, pricing policy and order processing. Every conversation with your customer begins with the retrieval of this information.

Any number of contact persons can be managed for a company address. A wide range of additional information about the company or contact person can be called up at a central location. This includes payment and sales conditions, planned sales targets or freely definable search terms.

Incoming and outgoing documents can be easily stored in the electronic archive. If you have any questions about offers or orders, a direct jump into the customer's projects is possible.

Relations between companies like: „Company A is the invoice or delivery recipient for company B", „Company C receives commission on orders from company D" are defined in a simple way and automatically taken into account in Your documents and the estimate.

Any number of selection criteria support marketing campaigns. The task of selecting all customers from a certain sales size for a campaign is done in just a few simple steps.

Integration is the programm !

The strategy is to connect solutions from other specialists via interface

With self-designed Word templates that are linked to the database, tasks of daily correspondence can be carried out effortlessly. The direct sending of e-mail and letter is possible at the push of a button.

Outlook integration connects RSK-KIS with MS-Outlook and the contacts can be exported.

With Google route planning integrated, find out more about the current traffic situation before You visit your customer.

Thanks to the TAPI interface, calls can be made from within the application. On incoming calls, the customer is recognized – the program shows the caller and his projects.

Statistics provide an overview

Evaluations and analyses (see Fig.1 and Fig. 2) from various tasks of the ERP system can be combined into cockpits in the Report Center.

The customer sales statistics show the recalculated orders with their absolute and percentage results.

The actual turnover, compared to the sales-targets on a year-to-year comparison show whether the customer confirms the planning with his orders – or not. There is still time to take control.
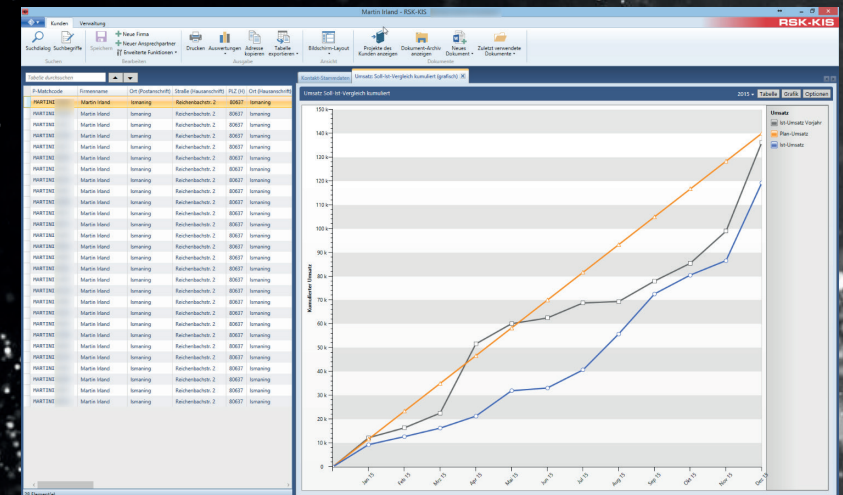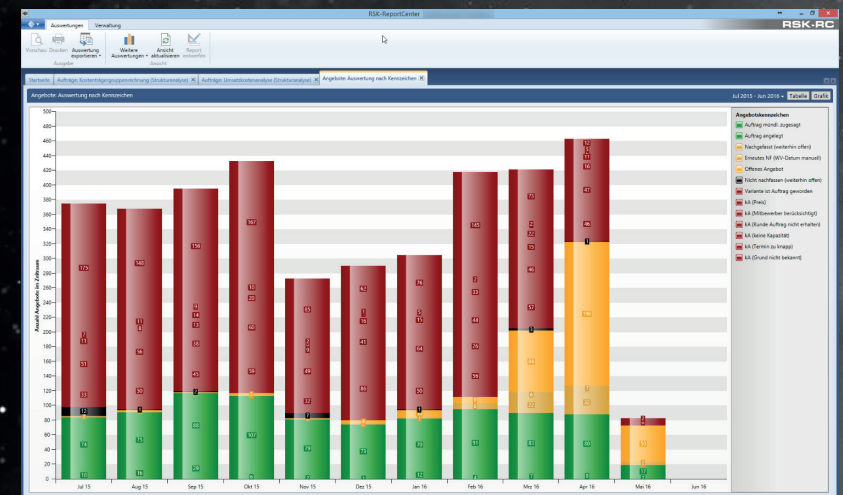

Fig. 1.   KIS surface „Turnover - target-actual comparison"

Fig. 2.   KIS surface Evaluations of the offers