



## 1. What is TECON?

The CRM system provides support of active customer relations management. However, the term customer can be expanded by all other entities coming in contact with the company (partners, suppliers, potential clients, state administration authorities etc.) for the purpose of CRM.

CRM software makes it possible to:

- Manage communication with customers
- Collect data and obtain information subsequently
- Increase the integral nature of access to a particular customer across the company and all communication channels
- Increase customer care efficiency

## 2. How can you benefit from using TECON?

The CRM system shall provide more efficient and transparent communication with clients, business partners, as well as participants of seminars and conferences.

Primary scopes resolved by the CRM are as follows:

- Integral database of contacts for the entire organization
- Uniform communication style
- Transparent communication history with concrete entities
- Mass e-mail sending
- Web interface access
- Cooperation with MS Exchange

The solution supplied is carefully adapted to the needs of the client's organization. We assume a common platform, general in the sufficient extent, for basic functions to be used by the majority of users, with possibility of specific extensions for certain groups based on their individual needs.

## 3. Modules

The CRM system is divided in several modules. Basic CRM modules are as follows:

- Contacts
- Activities
- Events
- Documents

For the description of individual modules see below.

### 3.1. Contacts Module

The contacts module is a directory of entities (organizations and contact persons), integrated for the whole company. The directory supports various ways of sorting, categorization and searching. An entity can be represented, for example, by a customer, supplier, partner, competitor, institution, etc. Every entity can have several addresses out of which one shall be marked as default.

Entity types are as follows:

- Organization (may include any number of contact persons)
- Contact person (may be included in multiple organizations)

The so called quick filter shall be available in the list views. The quick filter allows for sorting out only those records which correspond to the criteria entered in the table header.

Furthermore, the records can be sorted out using the search form that makes it possible to request a search even according to criteria not shown.

Fulltext search function in all fields (without attached documents) will be available, as well.

### **3.1.1. Mass Correspondence (Newsletter)**

The CRM system shall support sending of mass correspondence to all addressees according to entered parameters (search results).

Mass e-mails can be sent directly from the system using defined HTML templates. Fields from CRM can be inserted in the newsletter text using wildcard macro symbols, for example to insert address of the recipient. Upon sending the newsletter, such a symbol is replaced with the actual address from the CRM database.

### **3.2. Activities Module (Communication with Contact Persons)**

Activities summarize all interactions with other entities. According to their type, they can be sorted, for example, to telephone contacts, e-mails, meetings, offers etc.

Activity module function:

- Records on communication with registered entities (who, when, with whom, note on the nature and conclusion of communication)
- Planning of communication, notification (for example, call after one week concerning the offer sent), option of linkage to personal calendar in MS Outlook according to the user settings

The records make it possible to connect documents (for example, sent and delivered letters, concluded contracts, purchase orders).

### **3.3. Events Module**

Data about events held or events participated are stored in this module. Events may be specified by the event name, venue, date and time, event type, list of speakers, list of participants, etc.

### **3.4. Documents Module**

Documents module acts as central storage of documents for other modules. Documents can be sorted and searched by miscellaneous criteria and can be attached to records from other modules.

Documents can be for example:

- letter templates
- sample contracts, order forms, etc.
- prospects, quotations, catalogues, etc.

## 4. Printing

Preset print report templates are available for data printing. The templates make it possible to print data on contact persons, organizations, lists of results etc. from the system.

Another possibility of outputs printing shall consist in data transfer into the preset mass correspondence template in MS Word.

## 5. Synchronization

### 5.1. Synchronization with MS Exchange

Contacts in CRM may be synchronized with the Public or Personal folder in MS Exchange. Every contact person will be represented by one record.

### 5.2. Other Systems

The CRM system will be ready to communicate with other systems through standardized protocols and interfaces. However, every case will be resolved individually for the particular system.

### 5.3. Export

Lists of contact persons, activities, data on events and participants at events (including search results) can be exported.

Data from the system can be exported to the following formats:

- CSV (can be opened in MS Excel, as well)
- HTML (can be opened in MS Excel, as well)

## 6. Roles and Access Rights

The system administrator is able to set rights to individual tasks based on user roles. Rights are also possible to be assigned at the level of individual records.

## 7. Documentation and Training

Together with the built software, user documentation shall be handed over to the customer, as well, taking the following forms:

- On-line help directly in the application
- Printed as well as electronic version of quick user guide with explanations of basic functions
- Printed as well as electronic version of complete user documentation

Training of key users shall also take place upon deployment of every development phase, while the key users shall be able to train other system users subsequently (which shall provide self-sufficiency in training of newly coming employees, for example). A qualified representative of the supplier shall be present at the initial training of common users, and he/she shall be available as an expert consultant of key users.

