



eXtend – Customer Relationship Management

Overview

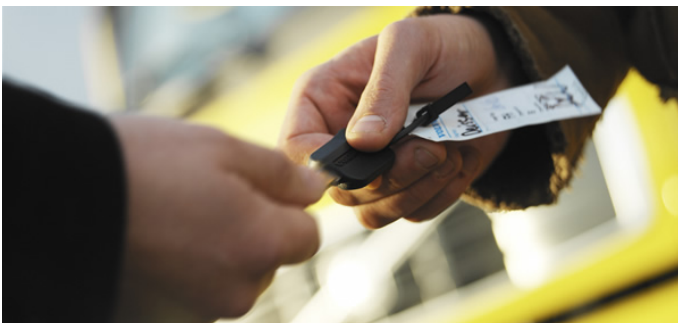
eXtend Customer Relationship Management helps dealer sales force manage their opportunities and serve their customers more effectively, increasing sales and customer satisfaction.

eXtend CRM is based on Microsoft Dynamics CRM with extensions specific for the Equipment Dealership and Rental sales organization. It equips dealer sales force with comprehensive capability for configuration and negotiation of deals.

The eXtend CRM deal sheets supports equipment, configuration, warranty terms, equipment trade-in, quotes, order and rental agreements.

With full visibility of equipment inventory, specifications, configurations, images, pricing information, attachments and options, customer credit position and margin information, your sales force is fully armed to serve customers and close deals.

eXtend CRM helps sales personnel manage the complete sales cycle in a structured and proactive manner, keeping track of each meeting, offer and interaction. It supports sales management with comprehensive management information.



Key Features

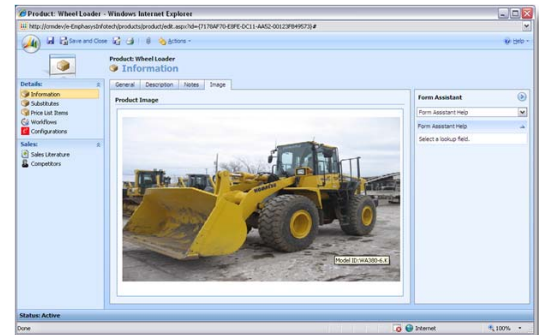
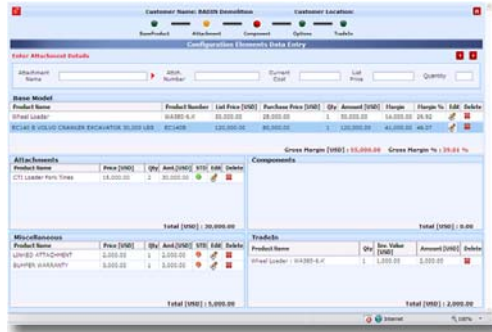
- On-line and off-line sales force automation supporting salesmen in the field with and without Internet connectivity
- Synchronization of information between eXtend CRM on the laptop and eXtend on the server
- Comprehensive customer, contact, fleet and history information
- Deal sheet offering the mechanism for structured needs analysis and configuration of quotes and orders
- Lightweight equipment configurator with support for images of models, attachments and options
- Price lists
- Equipment inventory visibility
- Customer credit information split by line of business (equipment sales, parts, service and rental)
- Funnel management providing visibility of the pipeline with drill down to individual opportunities





Key Features

- Tracking of sales activities
- Outlook Calendar and Mail integration
- Security restricting edit and/or view capabilities depending on the sales person's level of authority
- Approval workflow for proposals or orders exceeding discounting thresholds
- Easily integrated into your current Dealer Business System
- Comprehensive sales reporting and analysis
- Revenue and profit reporting by geography, branch, line of business, OEM, equipment category, model, etc with drill down to transaction detail
- Integration with sources of market intelligence to monitor sales activity in context of overall market activity
- Win-loss analysis



Benefits

- Focused and guided sales approach
- Tracking of all sales activities and customer interactions
- More effective customer sales interaction through interactive configuration and availability of offline customer information
- On site proposal generation
- All-inclusive proposals (equipment, attachments, warranty, services, trade-ins, etc.)
- Sales force productivity
- Complete customer interaction history
- Monitoring and management of sales funnel
- Advanced sales management reporting

System Requirements

OS: Windows; Database: Microsoft SQL Server; Web Server: MS IIS;
 Browser: MS Internet Explorer, Firefox

