

## axis diplomat 2020 Modules

# Customer Relationship Management

The **axis diplomat** Accounts Module includes a range of facilities provided as standard to allow you to control, record and analyse contacts with your customers, suppliers and prospects

### CRM Facilities

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**axis diplomat** contains a host of CRM facilities included as standard that are more than adequate for the vast majority of businesses. Companies that run intensive telesales or with a range of pro-active marketing activities, however, may also be interested in the Campaign Management module, which extends the CRM facilities to handle singular marketing activities (such as sending out a mailer and following up with email and telesales) or recurring activities, such as calling a group of customers on a regular (e.g. weekly or monthly) basis.

### Standard Features

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Amongst the CRM facilities included as standard with every **axis diplomat** system:

- record details of prospects as well as customers on your Sales Ledger; prospects cannot have orders, invoices, cash, etc. booked to their account but when they become a customer, their status can be changed at the click of a mouse, preserving all of the contact and quotation history from when they were a prospect
- define your own custom categorisation for customers and prospects to provide accurate profiling; for example you may decide that you want to categorise by geographic area (perhaps simply – south east, south west, midlands, etc), business type (manufacturer, wholesaler, retailer, etc) and so on – in up to ten different categories
- record details of an unlimited number of individuals (or contacts) within each customer, prospect or supplier; including DDI telephone or fax numbers, email addresses, mobile numbers, etc.
- categorise contacts using your own custom categorisation – perhaps, for example, you might choose to categorise them as director, manager, purchasing clerk, warehouse, accounts, etc. – each contact can belong to up to four different categories so one contact can, for example, be both a director and an accounts contact
- attach external documents to each customer, prospect or supplier – for example, scanned copies of trade agreements, maps, Microsoft Excel™ spreadsheets, etc.

## Call History

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The heart of the contact management facilities provided, as standard within **axis diplomat**, is the Call History recording. This allows you to keep a history of any contact or communication between you and your customers or prospects. Each call can be associated with a specific individual within the organisation that you are dealing with and can be allocated to the responsibility of one of your operators. Calls can be categorised using your own custom categorisation. By using one of the levels of categorisation to indicate the department, the Call History facility can be used simultaneously for sales management, accounts/credit control and even customer services – since each call is allocated a unique number by the system, it can be used for managing a returns system, including the issuing of returns (RMA) numbers.

A range of enquiries and analysis reports allow you to keep track of, and analyse calls so that you can see, for example, the number of outstanding calls for a particular member of staff, department or customer.

External documents, such as emails, faxes, Microsoft Word™ documents, etc. can also be attached to Calls on the system, allowing a complete history of the item to be seen by anyone at any time. The system also allows you to create Word documents attached to the call from a selection of Word templates that you can add to the system. Information (such as names and addresses) can be automatically merged into the template when **axis diplomat** creates the Word document. This means that all of your standard letters can be stored within the **axis diplomat** system and produced at will, with contact information already inserted for you at the point of creation.

## Using the CRM Information

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As the information is accumulated within the CRM areas of the **axis diplomat** system, various facilities are available to utilise that data:

You can, for example, create a mail merge within Microsoft Word™. Depending on how you set up the custom and contact categorisation, you could send a mailing to all of the Accounts contacts within all of the Wholesale companies in the Midlands.

**axis diplomat** also includes 'emailshot' capability as standard so in addition to (or instead of) sending a paper mailing, you can send an email to all of those contacts.



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