

Data Sheet - EFACS Mobile CRM

EFACS Mobile CRM allows off-site users to transact and report on sales orders, quotations, projects and customer details.

EFACS Mobile CRM allows field sales staff and customer service teams to view, add and update sales information wherever they may be. Enabling real-time access to this information improves customer service, customer retention and ultimately increases sales and customer loyalty.

EFACS Mobile

Key Functionality

- Manage Quotations
- Manage Sales Orders
- Manage Sales Projects
- Share Documents
- Manage Company/Contact Information
- View Live Part Information
- Manage Tasks
- Manage Projects
- Related Information



Reporting

EFACS Mobile CRM provides a set of reports as standard whilst also allowing customers to generate their own reports should requirements differ. Reports can be generated via BIRT, or via Power BI, which enables instant access to up-to-date, interactive graphical information.

The standard Mobile CRM Reports include:

- | | |
|-----------------------------|----------------------------|
| • Order Items | • Quotations |
| • Orders Summary | • Quotation Items |
| • Orders | • Quotations Summary |
| • All Parts | • My Orders |
| • Customer Accounts (Full) | • All Orders Detailed |
| • Customer Accounts (Brief) | • Completed Customer Tasks |

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Near Me

Utilising the mapping functionality, 'Near Me' will show the location of customers and prospects relevant to you and your role.

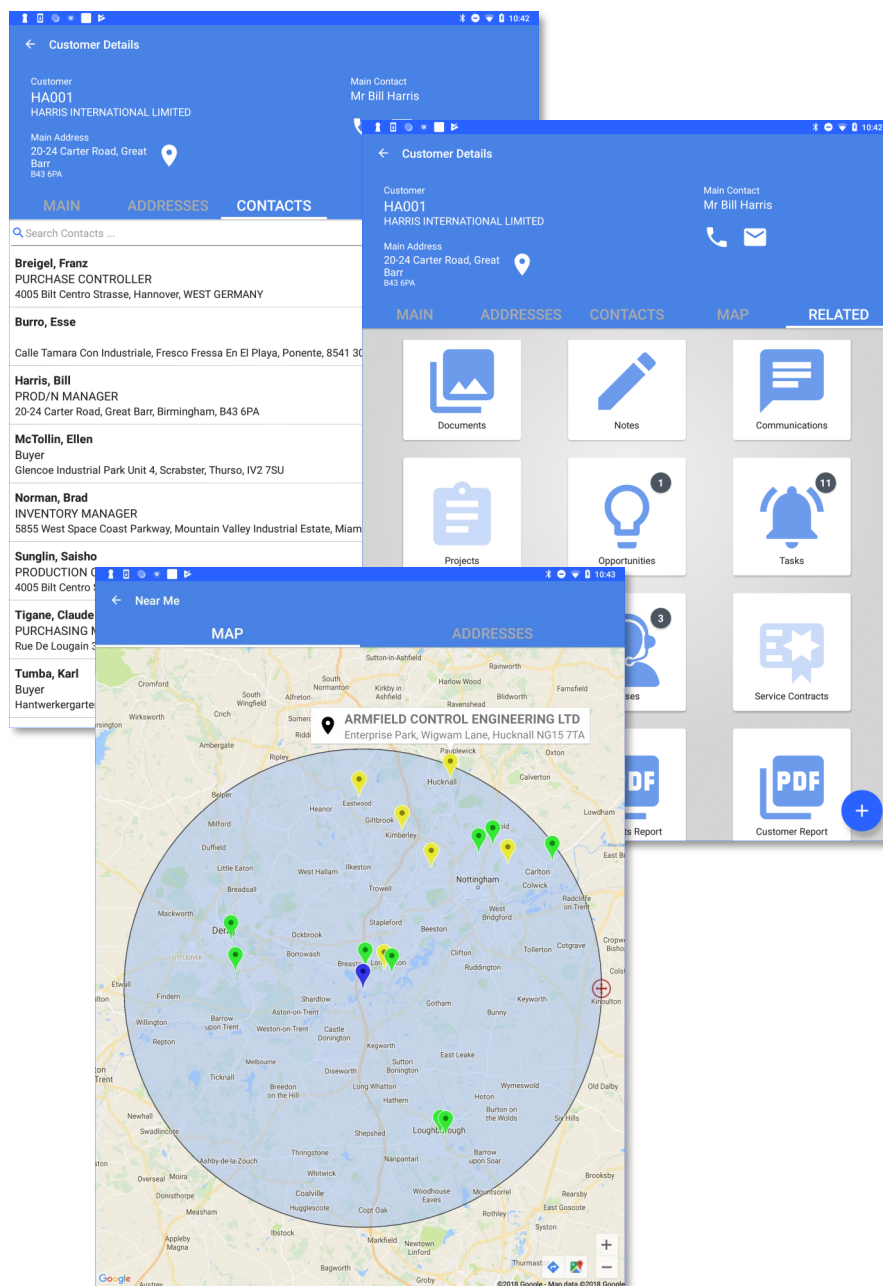
Yellow markers represent prospects and green markers represent customers, tapping on a marker will show the name of the customer, or prospect and the address. An option is provided to utilise Google directions.

Related Information

This functionality provides a display of related content for the selected customer, or prospect. If your customer has a number of open cases, outstanding quotations or tasks, etc. these will be highlighted in the 'Related' tab, providing easily accessible visibility of your companies interactions with your customer, or prospect.

Business Benefits

- Increased sales team productivity
- Extends functionality to the 'field'
- Real-time data access for sales, management, support, etc.
- Create/amend quotations, orders and contacts whilst on a customer site
- Allows secure, auditable access to back office data
- Improved insight – Users can view reports on the move



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