



Lotus Domino® Application



***GEOCOM® CUSTOMER &
CONTACTS***

Version 5.0 '15.11. 2002' Build 240

Product information

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1 Advantages

- Independence of platform
- Easy administration of customer data
- Communication via integrated TAPI system and Notes-Mail via SMTP and X.400
- High convenient user interface
- Full integration of documents
- Embedding of OLE-Objects into customers' and project history
- Integrated re-submission capabilities for all staff members
- Easy generation of pre-defined electronic sheets for correspondence without using other external word processing systems
- Dynamical generation of address information, form of address, date for correspondence and mass-mailings
- Full text indicated search operations
- Delegation of activities and tasks to other employees
- Informationpool including data about relations to customers and activities as overview for Management and Controlling
- Sensitive data: Far reaching access restrictions

2 Management Abstract

GeoCom® Customer & Contacts is an electronic information system, that supports the administration of customers, contacts and projects in an easy, fast and clear way. On base of customer data and contact profiles all activities - phone calls, meetings, correspondence, offers - are maintained visibly and effectively. The complete history of the relationship to a customer is permanently available at a glance including all related documents. The integrated system for re-submission enables everyone to organize the work for themselves.

GeoCom® Customer & Contacts is based on the Groupware platform Lotus Domino®. By more than 30 million licenses for workstations sold it currently marks the standard for Workgroup applications. Thus all highlights are available that make Lotus Domino the worlds market leader within this area: independence of platform, replication capabilities over distributed locations and full support of mobile users.



Illustration: Main Navigator

Crucial element is an open information pool including features concerning every single customer, contact profile, project, offer, and transaction.

Hereby GeoCom® Customer & Contacts supports different activities such as the acquisition of new customers, cultivation of the relationship to customers as well as the supervision of transactions.

The application is not only suitable for the management within the area pre-sales but also enables staff members to use it for generating new offers.

GeoCom® Customer & Contacts is suitable to every specific IT-environment and can easily be extended in different ways. The database is designed to be used in LAN, WAN, remote or standalone.

2.1 Main objectives of GeoCom® Customer & Contacts

As mentioned, GeoCom® Customer & Contacts supports the administration of data regarding customers, contacts, and projects easily.

An integrated system for re-submission of activities enables employees

to organize their work themselves, or to delegate tasks to other employees.

The database can be operated without permanently being online. All administration tasks can be furnished completely at all locations, e.g. from home office or remote during a business trip.

2.2 What are the remarkable features of GeoCom® Customer & Contacts?

One of the main features of GeoCom® Customers & Contacts is the high convenient user interface. It means that the complete spectrum of operation elements can be easily reached either over the menu, the icon-bar, the task-line, or by the views. Even without long training on this database all employees can work with it effectively.

Operating with GeoCom® Customer & Contacts means to have more facilities to support the own organization of pending tasks. Hereby users can sign up activities related to a customer (e.g. phone calls or correspondence) with a re-submission date.

By one mouse-click the user gets an overview of tasks still to do. Additionally it is possible to make comments on specific activities and to delegate or forward commented documents to other persons.

3 Maintenance of data

The application is based on customer and contacts as master data. In order to have a standardized maintenance a new customer profile will be created containing information to specific items of the company, institution or authority.

Illustration: New customer profile

To each customer profile an unlimited number of contact profiles can be assigned. Additionally staff members can lay down specific comments like characterizations or descriptions respectively to every single contact.

3.1 Activities

All activities related to a customer or project are maintained in the database. It provides the users with a chronological sequence of the customers' situation. And for the most activities like phone calls, correspondence, meetings, offers, or other transactions electrical admission forms are available.

Illustration: Meeting

To these admission forms files can be attached. With the internal Notes-viewer, that accepts more than 150 different file formats, even those documents and files can be visualized that have been generated by applications not installed on the user's computer.

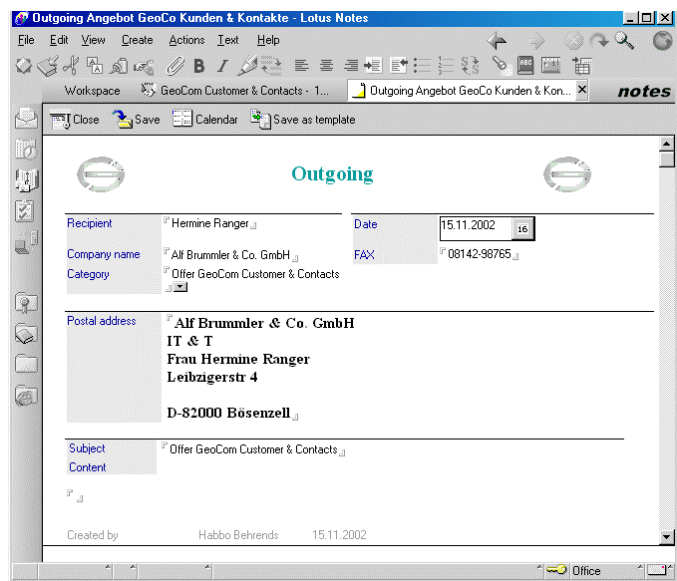


Illustration: New outgoing correspondence

➔ For individual requirements: Specific pre-defined admission forms can be designed and implemented any time by ISG GmbH.

3.2 Overview by master data

With the application GeoCom® Customer & Contacts every user gets a complete overview of the master data by visualising the customer profiles, contacts, and projects as well as comments and the re-submission dates for activities. Information is permanently retrievable and maintained to different categories as e.g. companies or contact profiles.

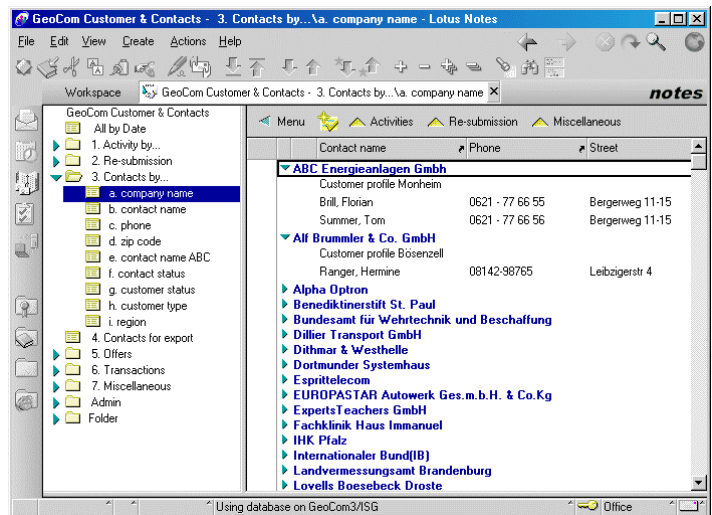


Illustration: View “Contacts by company name”

Even during a phone call users can immediately retrieve information about a customer by switching to the related history with all its documents.

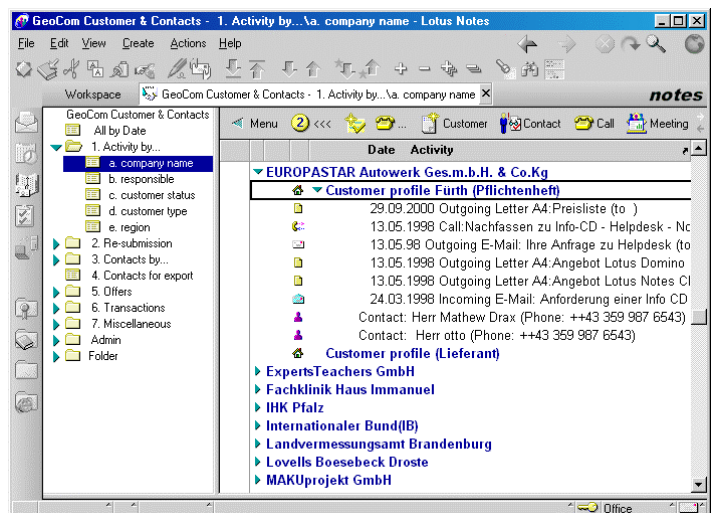


Illustration: View “Activity by company name”

3.3 Overview of customers and projects

Users can seek for specific information on a project by selecting different criteria like responsible persons (contact names) or status of a project (e.g. “project in progress”, “project closed” etc.). Within the forecast every user receives condensed information about the history without redundancy.

3.4 Chronological overview of customer and project history

The application GeoCom® Customer & Contacts provides the user with a complete and detailed overview of the relationship to a customer or project. At any time authorized persons are able to evaluate the current status of a relationship or project.

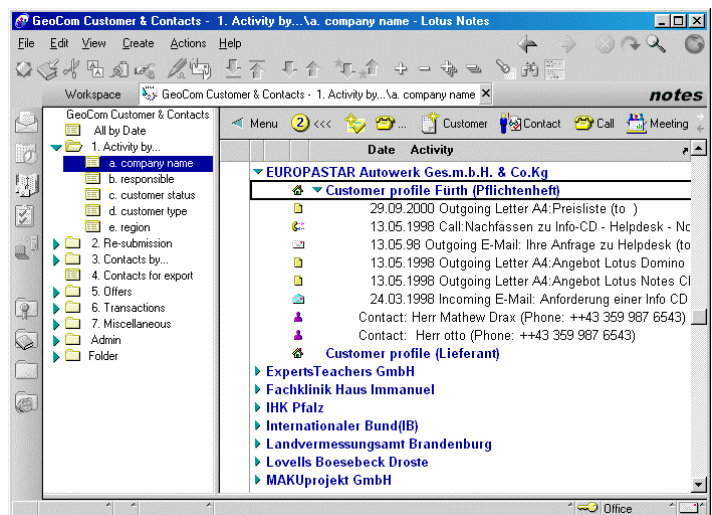


Illustration: View “Activity by company name”

By selecting the option “activities” within the main menu the user gets a chronological overview of all activities from the first contact up to now.

The open architecture of the database makes the administration of the data more transparent. And this not only for the users themselves but also for managers.

Its convenient interface makes it possible that new employees work intuitively correctly with the application and get quickly used to their new tasks. And project managers count with a comprehensive and detailed overview over the variety of projects.

3.5 Evaluation, planning and controlling of sales activities

For the selling people GeoCom® Customer & Contacts is a tool to create and observe their activities such as offers, expected orders and transactions. Offers and transactions can be collected, evaluated and exposed monthly or annually.

Date	Description	Amount	%	Expected
All Brumler & Co. GmbH				
2001				
10.2001				
11.10.2001	GeoCom Library	560	100%	560
2002				
08.2002				
08.08.2002	GeoCom Customer & Contacts	8.750	75%	6.563
Alpha Optron				
2002				
04.2002				
14.04.2002	GeoCom Helpdesk	472	95%	448
		9.782		7.571

Illustration: View “Offers by customer name”

Each activity can be signed up with a re-submission date or delegated to other members of the company.

Financial transactions can be tracked, associated with a member of the selling department and cumulated monthly over the years. All information will be exposed in a chronological sequence.

Illustration: Transaction form

3.6 Integrated re-submission capabilities for activities and task tracking

The integrated re-submission capabilities enables users to sign up activities with a re-submission date either for themselves or for other members of the workgroup.

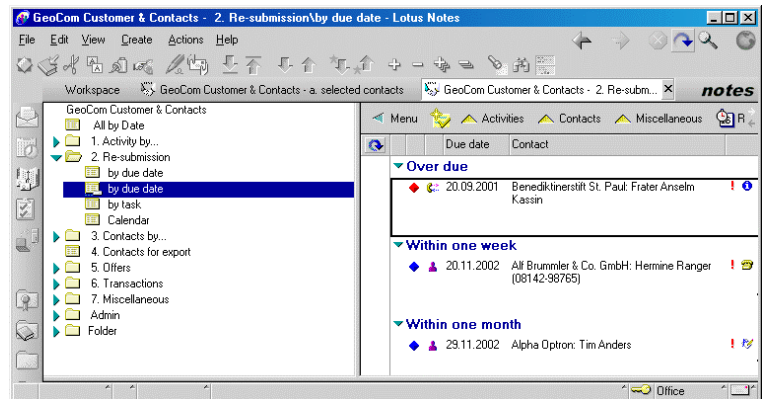


Illustration: View “Resubmission by due date”

In order to organize future tasks it is possible to preview all upcoming activities like phone calls, correspondence or expected feedback.

3.7 Operating with TAPI: Automatically generating of telephone calls

Today, nearly all customers count with electronic mail systems, however, the telephone might be still the most important tool within a professional acquisition process.

GeoCom® Customers & Contacts gives support by an integrated dialling system, TAPI, the standard for computer generated telephony.

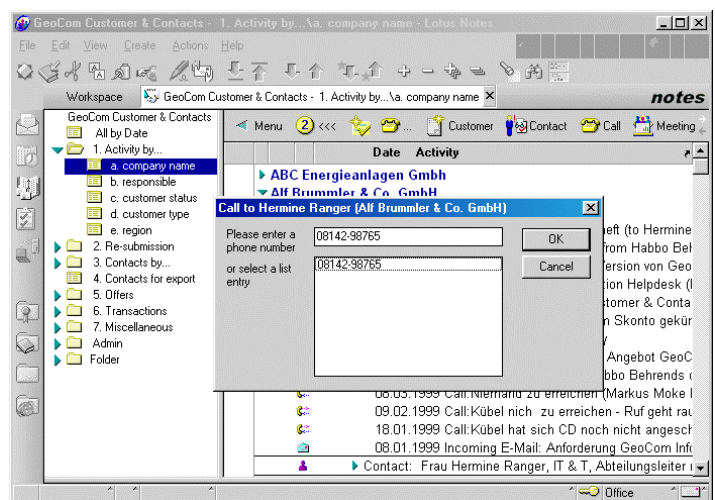


Illustration: TAPI

With this integrated system users are able to create by one mouse click internal or external telephone calls without necessarily abandoning the database. And all information can be assigned as a phone notice to the history of activities.

3.8 Delegation of tasks to other members or working groups

Besides signing up activities and documents with a re-submission date it is also possible to delegate specific activities to other members of a working groups.

As well as task tracking it is possible to generate mass mailings. In order to generate mass mailings only four steps are necessary:

- Selecting the addressees
- Assignment to a pre-defined sheet for correspondence
- Generation of the documents (correspondence)
- Printing the documents

Illustration: Search mask for Contacts

The selection of the addressees can be furnished by using the integrated search formula. Users can seek for postal zip codes, and / or data referring the customer's type, regions or other pre defined attributes.

The letter templates for mass mailings can be individually designed without any restrictions. In order to avoid that Mr. Thompson becomes Mrs. Thompson information to the address like letter salutation and postal address is maintained within the contact profile and will dynamically be attached to the letter body. Letter templates can be signed up with a date for re-submission. External word processing systems are not necessary. However, it is still possible to export data for mass mailings or other processing applications in order to work on with established applications.

3.9 Import of customers and contact profiles

Besides the exportation of data it is also possible to import existing

data from other sources into the database GeoCom® Customer & Contacts.

The application counts with integrated import tools as well as external tools like NotesPump to synchronize data with external databases on a regular base. It avoids not only an unnecessarily recollection of data but also accelerate the implementation in order to shape the management more efficiently.

3.10 Configuration

GeoCom® Customer & Contacts is largely configurable to the needs of nearly every class of requirements just by filling in new data into the configuration document.

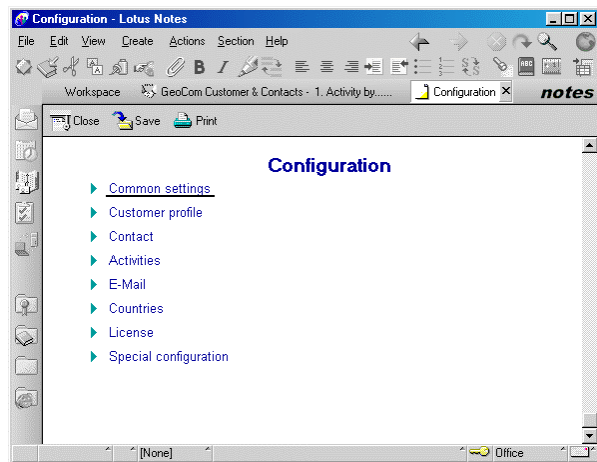


Illustration: Configuration document

Personal configuration is also available, like automatically use of a special view on startup, defining the MS-Word version used or just to add rules for automatic creation of letter salutation and postal addresses.

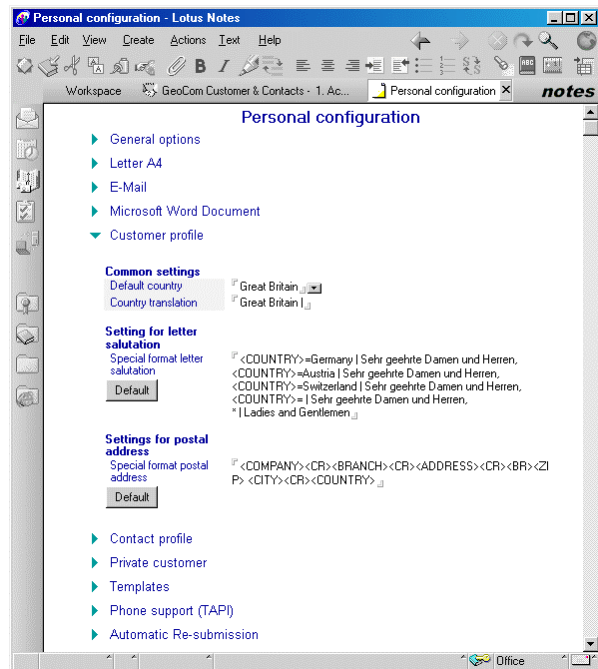


Illustration: Personal configuration document

3.11 Access control for sensitive data

The database GeoCom® Customer & Contacts uses the wide range of data security which is built in Lotus Domino®. Access to sensitive data can be restricted – starting at the hardware level (special ports), the database- and document-level up to transferred data on the network, and for locally stored data. Confidential information is absolutely safe and will be maintained confidential at any time.