



Lotus Domino® Application



## **GeoCom® Customer & Contacts**

Version 6.0 '10th March 2005' Build 256a

**Product information**

# Content

<b>1</b>	<b>MANAGEMENT SUMMARY .....</b>	<b>3</b>
1.1	Highlights for staff and project manager.....	4
1.2	Highlights for IT-staff.....	4
<b>2</b>	<b>GEOCOM® CUSTOMER &amp; CONTACTS – AN OVERVIEW .....</b>	<b>5</b>
<b>3</b>	<b>ADMINISTRATION OF MASTER DATA.....</b>	<b>7</b>
3.1	Customer profiles.....	8
3.2	Contact profile.....	9
<b>4</b>	<b>ACTIVE CUSTOMER MANAGEMENT .....</b>	<b>10</b>
4.1	Standard activities.....	11
4.2	Computer aided telephoning (TAPI).....	14
4.3	Evaluation, planning and controlling of sales activities.....	15
4.4	Integrated resubmission capabilities .....	16
4.5	Delegation of tasks .....	16
4.6	Correspondence.....	16
<b>5</b>	<b>ADMINISTRATION AND CONFIGURATION.....</b>	<b>18</b>
<b>6</b>	<b>EXTENSIBILITY .....</b>	<b>18</b>

## 1 Management Summary

### ***Efficient customer management***

GeoCom® Customer & Contacts is an innovative customer and sales management information system that provides an easy and quick way to administrate customers, contacts and projects electronically.

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 world market leader within this area: independence of platform, replication capabilities over distributed locations and full support of mobile users.

Hence, GeoCom® Customer & Contacts is best suitable for the usage at different locations.

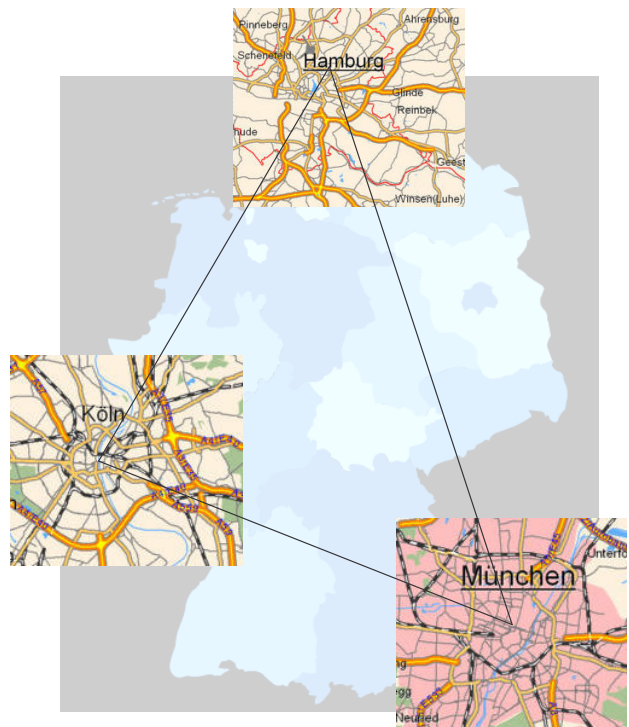


Illustration: Example for different locations

### ***Different areas of application: Customer operations – Pre-sales***

GeoCom® Customer & Contacts supports different activities such as the acquisition of new customers, customer care as well as the supervision of transactions.

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

### ***Platform independent management-tool for distribution activities***

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.

### 1.1 Highlights for staff and project manager

- Information pool including data about relations to customers and activities as overview for the management and controlling
- Chronological history of projects, customer relations and any other contacts – available at any place and time (information pool for the management)
- Full text indicated search operations
- Optimisation of self organisation by setting resubmission dates
- Delegation of pending tasks and activities to other employees
- Easy and clear administration of customer data through electronic form sheets
- Evaluation, planning and supervision of customer related activities
- Integrated, Notes-based word processing system for correspondence (e.g. mass mailings)
- Dynamic reorganisation of address information
- MS-Word-integration
- Embedding of OLE objects into customer and project history
- Intuitive database handling
- Mobile usage
- TAPI-convenience
- Work offline with full data integrity
- E-Mail-import through one mouse click into selected documents (contact profiles)
- Usage in LAN, WAN or Remote
- Adjustments to the company-internal look-and-feel

### 1.2 Highlights for IT-staff

- Easy database configuration and administration
- Customer specific extensions, flexible to existent infrastructures and networks
- German or English user interface
- Database centrally administrable
- Far reaching security functions through personal assignment of access rights
- Updates without layoffs
- Company wide determination of personal configuration (Policy)
- Data-import for many different data formats possible
- Hotline-Support through **ISG Information Systems GeoCom GmbH**
- In-house training for users and administration staff

## 2 GeoCom® Customer & Contacts – an overview

### ***'Up-to-date' information pool for customer data***

GeoCom® Customer & Contacts is an electronic information system, that supports the administration of customers, contacts and projects in an easy, fast and clear way. It is likewise suitable for internationally operating enterprises, associations or institutions (e.g. universities).

In short: it is designed for an efficient customer management, no matter if for 10 or 1000 customers. The databases principal item is an up-to-date information pool that contains all previous and current customer information, projects, offers, transactions and sales in chronological order.

### ***Fast information through standardised data storage***

Based on customer data and contact profiles all activities - such as phone calls, meetings, minutes, correspondence, offers - can be administrated easily and effectively. Therewith, any needed information is at a glance and permanently available.

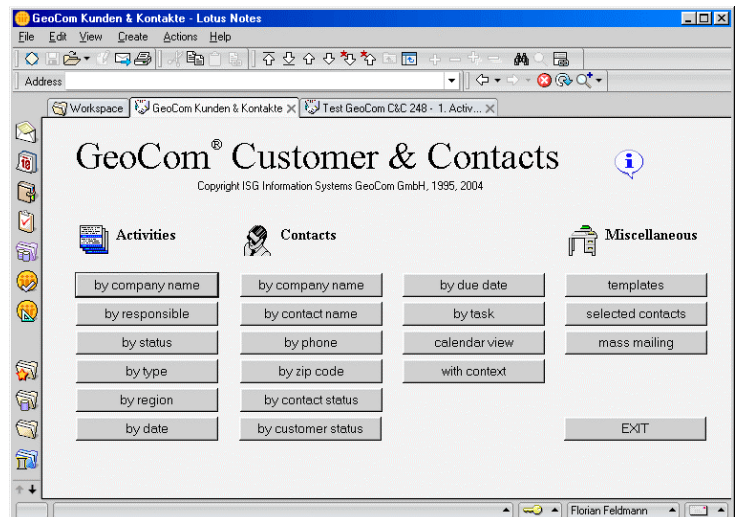


Illustration: Main Navigator

### ***Optimisation of workflows and self organisation***

Additionally GeoCom® Customer & Contacts supports users in scheduling their tasks. The integrated resubmission function guarantees that particular tasks can be delegated to other employees or groups. Customer specific tasks such as phone calls, mailings or correspondence can be check marked with a resubmission date.

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

### ***Mobile usage with full data availability***

The database can be operated without being online permanently. All activities can be performed from all locations, e.g. from the home office or remote during a business trip – with full data availability.

**Easy database handling**

GeoCom® Customer & Contacts is characterised by its easy and intuitive database handling.

The synthesis of functionality and a very convenient user interface leads to use the customer information system correctly already after a few minutes.

Even without long and costly training on this database all employees can work with it efficiently.

**Electronic assistants for better working**

To better work, users will be supported by a wide range of electronic assistants like e.g. specific form sheets to record new customer data and other personal information.

Recurrent working tasks – e.g. within the phone call management or mailing activities – can be handled more effectively by using specific dialogue boxes. Thereby users can quickly assign letters and e-mails to the corresponding contact people. Using TAPI makes it possible to connect employees by one mouse click with a customer.

At all times, it is also possible to comment activities, offers or phone calls and to delegate these documents to the responsible person or department. This enables supervisors and managers to be permanently updated.

### 3 Administration of master data

The customer management system GeoCom® Customer & Contacts supports the management and administration of data regarding customers, contacts and projects. It is designed for the gathering and administration of all customer related activities (e.g. acquisition of new customers, offers, transactions etc.).

The management system is based on customer and contact information. In order to ensure a standardised database structure a specific customer profile will be generated for every new customer. To each customer profile an unlimited number of contacts can be assigned. That way you gain a detailed image of each customer and the appendant employees. The in this manner gathered master data are a valuable source of information for a good customer relationship.

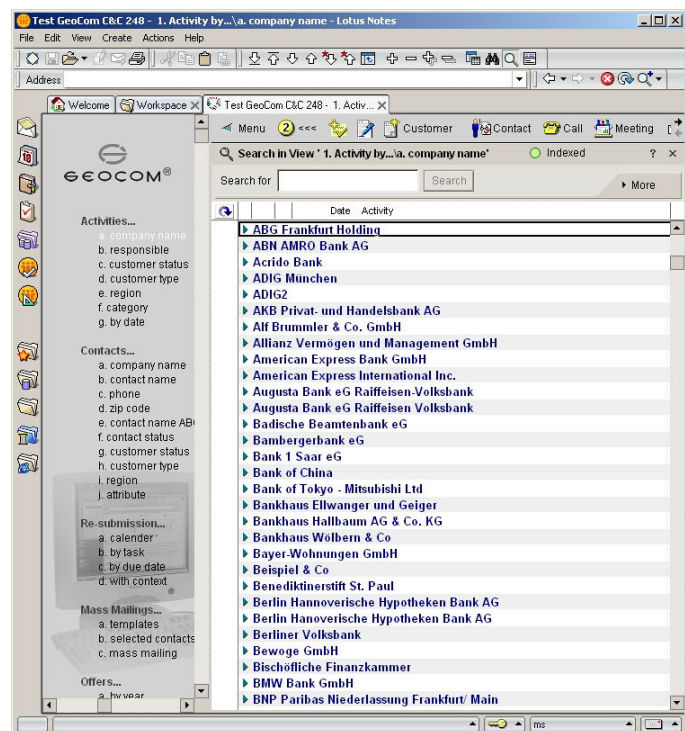


Illustration: Activities by company name

### 3.1 Customer profiles

For a quick and easy recording of new customer profiles GeoCom® Customer & Contacts provides electronic administration form sheets. In each of these form sheets the user can fill in basic customer data such as the company, institution or university name. Each form sheet that contains the master data results in a specific customer profile.

The screenshot shows a Lotus Notes window titled "New customer profile - Lotus Notes". The window contains a form with the following fields and values:

Company name	Deutsche Bank Privat- und Geschäftskunden AG	Phone	
Branch		Fax	
Street		Homepage	
ZIP & City		E-mail (M)	
Country	Germany	Language	
Description			
Responsible	GeoCom Development/ISG	Customer type	
Contact by	Internet	Region	
Working Area Liste		Medienliste	
Special			
Project			
Customer status	<input checked="" type="checkbox"/> Interessant	<input type="checkbox"/> Präsentation	<input type="checkbox"/> Angebot (geschlossen)
	<input type="checkbox"/> potentieller Kunde	<input type="checkbox"/> Pflichtenheft	<input type="checkbox"/> Projekt (offen)
	<input type="checkbox"/> Lieferant	<input type="checkbox"/> Angebot (offen)	<input type="checkbox"/> Projekt (geschlossen)

Illustration: Electronic form "new customer profile"

Besides administrating the relevant address details as well as phone, fax and e-mail through therefor designed lists, you can also gather further information about your customers. The user check marks the corresponding entries, such as customer type, status – e.g. „interested“ – or region where the customer is headquartered, in precast lists and adopts them to the form sheet.

### 3.2 Contact profile

To each customer profile an unlimited number of contacts (persons) can be assigned and saved. That means that the user can generate a new contact profile for every single contact person (company, enterprise, institution etc.) in only a few seconds.

Additionally users can enter comments like characterisations or descriptions for every contact such as contact name, position, department and the personal e-mail-address and phone / extension number.

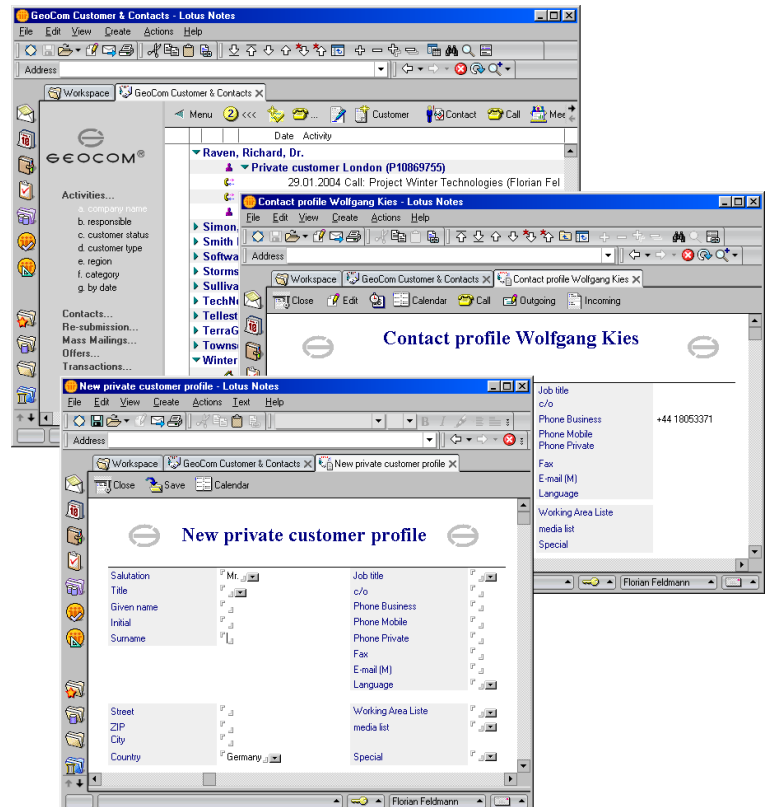


Illustration: Electronic forms “new contact profile” and “private customer profile”

In addition, GeoCom® Customer & Contacts also guarantees that profiles for private people who are not associated to a company can be created. For this type of customer a special form sheet (private customer) is available.

## 4 Active customer management

### *Developed for customer related efficient workflow*

Customer related activities and distribution comprise different working areas. The practical development of GeoCom® Customer & Contacts takes this into account covering the management of both customer related data and distribution data.

### *Chronological overview of projects*

All activities related to one customer or project are stored in chronological sequence in a main database. This main database reveals a detailed overview of the customer situation.

All employees of a company can access this main information pool to obtain any information they need related to customers and distribution.

### *Electronic assistants to optimise the workflow*

For a multitude of distribution related activities such as phone calls, correspondence or meetings electronic assistants and form sheets are at your disposal to optimise the workflow.

Additionally, for project managers GeoCom® Customer & Contacts provides a detailed overview of all relevant data – independently of single reports of involved employees.

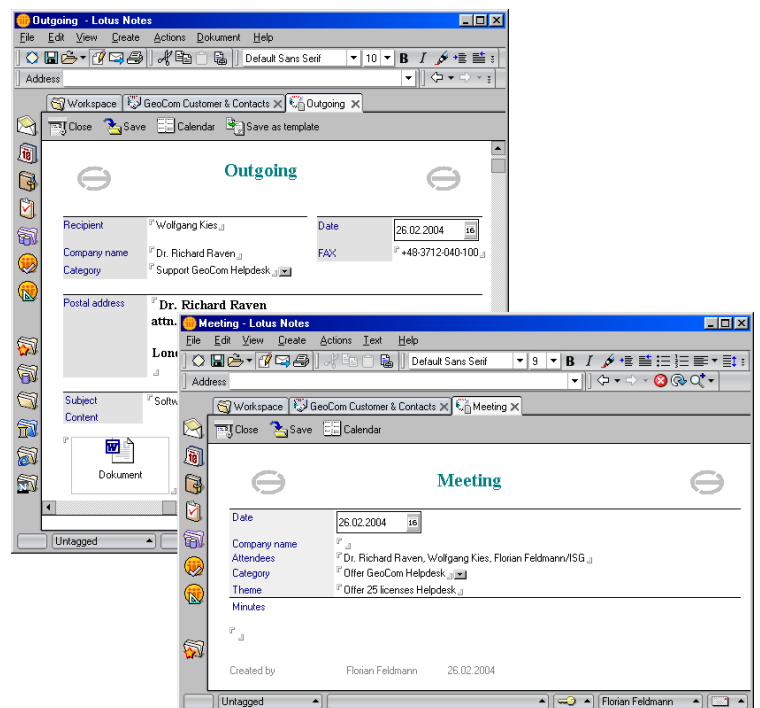


Illustration: Electronic Forms "outgoing correspondence" and "meeting"

### *Easy integration to already existing IT-infrastructures*

A perfect customer care and a perfect order processing can only be achieved if the complete office environment is integrated. Hence, it is possible to implement GeoCom® Customer & Contacts to already existing IT-infrastructures. This ensures the combination with other applications.

#### ***Complete documentation through embedding of OLE objects***

For business activities it is indispensable to list all customer or distribution related activities completely and transparently for all responsible employees. To ensure this the user can display each activity by an independent admission form.

Documents that derive from other systems (e.g. letters, tables etc.) can be easily integrated to the database as attachments or OLE objects. With the internal Notes-viewer which accepts more than 150 different file formats even those documents and files can be visualised that have been generated by applications not installed on the user's computer.

#### ***Notes-based word processing system for standard activities***

Standard activities – e.g. mass mailings, daily correspondence etc. – can be accomplished with the integrated Notes-based word processing system.

### **4.1 Standard activities**

#### ***Overview by means of master data***

With the application GeoCom® Customer & Contacts you get a complete and detailed overview of the status of all accomplished transactions in just a few seconds. By means of master data the user is able to visualise the customer profiles, contacts and projects as well as comments and resubmission dates for all activities.

All information is permanently recallable in different categories such as e.g. activities according to the company names or contact profiles, or e.g. according to already made offers and transactions.

Through various selection options the user is able to read through the customer history quickly and precisely even during a phone call. This allows you to act in a more competent way while you are talking to a customer on the phone having all the information you need available.

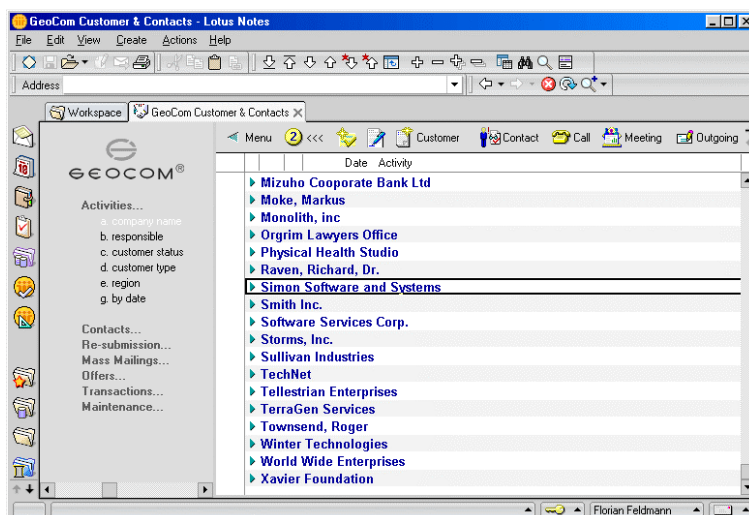


Illustration: Overview "Activity by company name"

### **Overview by means of customers and projects**

Besides the overview by means of the master data - such as customer and contact information - the user can also recall any customer or project data through other criteria like the employees name who was in charge of a specific task annotated in the database or the status of a activity (e.g. "project in process" or "project accomplished").

This way the user obtains very specific detail information without the normally usual amount of data. Redundant information will not be administrated.

### **Chronological overview of customer and project history**

The management information system GeoCom® Customer & Contacts provides every employee with a detailed overview of the relationship to a customer or a project. In this way supervisors and project managers are able to evaluate precisely the current status of business and project developments.

All activities – such as phone calls and/ or correspondence with customers – are listed in a chronological order. This enables a permanent evaluation of activities and projects regarding their progress and success.

### **Easy and convenient handling**

Through the convenient and intuitive interface new employees quickly are familiarised with the application and are able to be acquainted to their new tasks without long time lags.

Project managers count with a comprehensive and detailed overview over the variety of projects and it becomes easier to be a competent contact person.

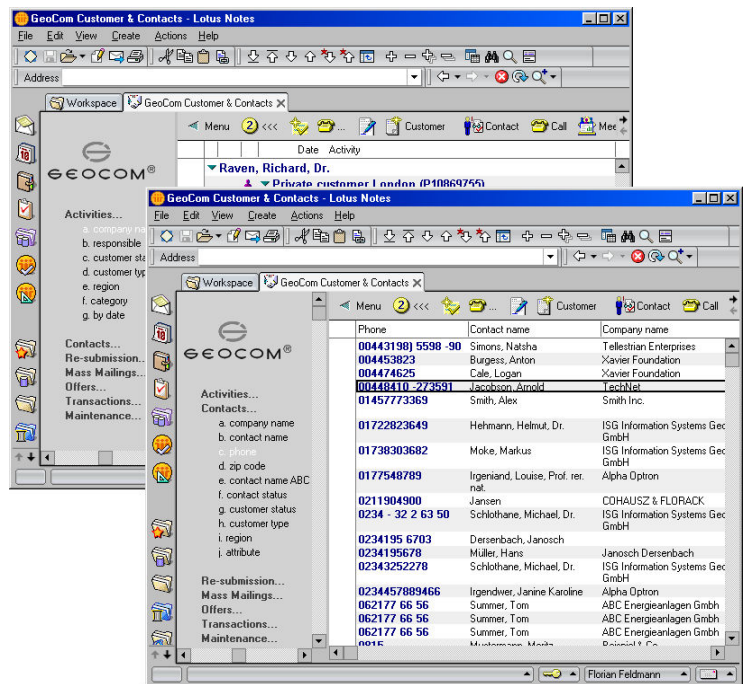


Illustration: Overview according to specific needs

## 4.2 Computer aided telephoning (TAPI)

Despite the increasing extension of the usage of electronic communication systems via email the telephone remains the main tool for professional customer acquisition and care.

GeoCom® Customers & Contacts supports you with the integrated dialling system TAPI - the standard for computer aided telephony.

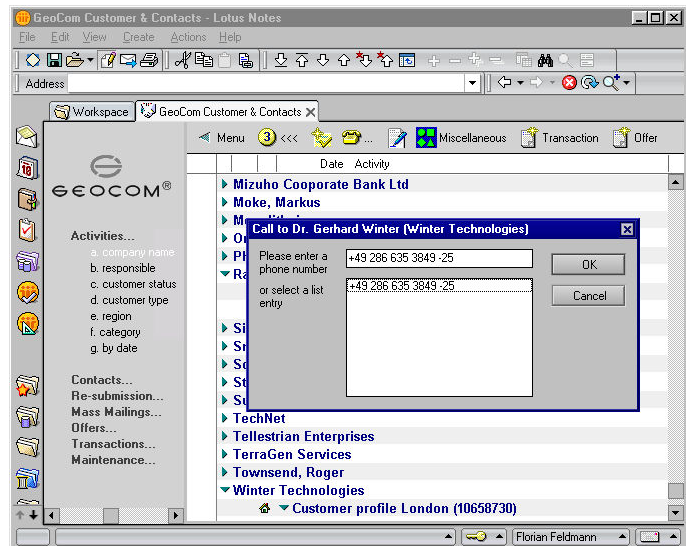


Illustration: TAPI

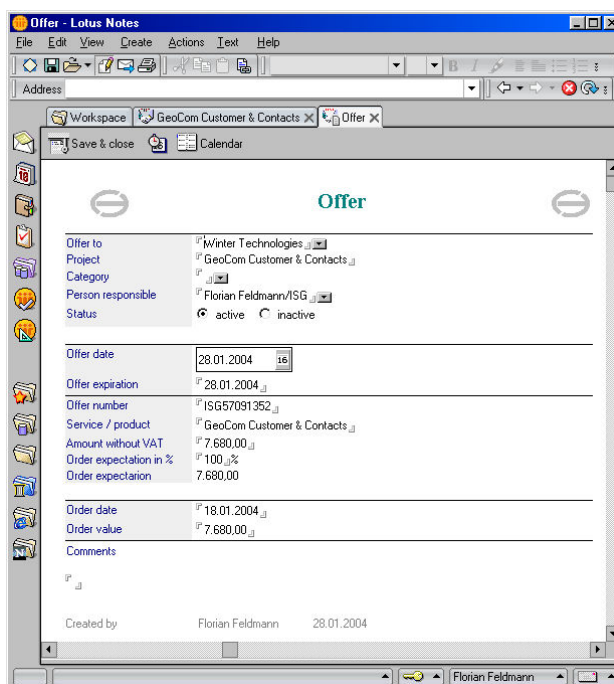
Through the integrated TAPI module you can establish company internal or external telephone connections by one mouse click. Afterwards all information about the phone call can be assigned to the history of activities of the called customer.

### 4.3 Evaluation, planning and controlling of sales activities

For the sales staff GeoCom® Customer & Contacts is a good tool to record and observe their personal activities such as offers, expected figures for future conclusions of deals and other transactions.

This high degree of details enables you to carry out your personal control of success at any time!

Data regarding transactions and offers can be collected and evaluated through special electronic forms to then be displayed accumulated in month and year reports. You can also add resubmission dates to offers or delegate them to other members of a working group. All offers and transactions are displayed in a chronological overview and assigned to the respective employee.



The screenshot shows a Lotus Notes window titled "Offer - Lotus Notes". The window contains a form for an "Offer". The form fields are as follows:

Offer to	Winter Technologies
Project	GeoCom Customer & Contacts
Category	
Person responsible	Florian Feldmann/ISG
Status	<input checked="" type="radio"/> active <input type="radio"/> inactive
Offer date	28.01.2004
Offer expiration	28.01.2004
Offer number	ISG57091352
Service / product	GeoCom Customer & Contacts
Amount without VAT	7.680,00
Order expectation in %	100 %
Order expectation	7.680,00
Order date	18.01.2004
Order value	7.680,00
Comments	
Created by	Florian Feldmann
	28.01.2004

Illustration: View "Offers by customer name"

Finely structured evaluation, planning and control possibilities optimise the wise co-ordination of your sales activities.

#### 4.4 Integrated resubmission

The integrated resubmission capabilities enable the user to manage their activities and duties in a more efficient way. Therefore a resubmission date can be added to an unlimited number of activity documents.

This gives you the possibility of getting a preview of all pending tasks and it also ensures that important activities like phone calls within customer care do not fall into oblivion.

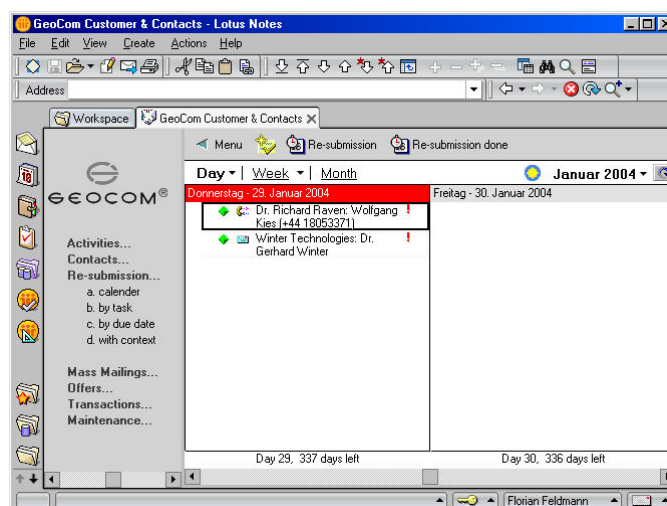


Illustration: View "Resubmission by due date"

At the push of one button you can see the resubmission according to activities - which also enables you to check the date when a customer has been contacted the last time and when it is probable to get a feedback from that person.

#### 4.5 Delegation of tasks

To create a base for a more efficient division of labor you can delegate activities to other employees - besides the possibility of putting a resubmission date.

#### 4.6 Correspondence

Even without using an external word processing system it is easy to manage your correspondence issues with GeoCom® Customer & Contacts.

For this, the sales and customer management system disposes of a Notes-based module for word processing. Standard activities such as mass mailings can be done directly from the database – without separately copying address data.

### MS-Word-Integration for mass mailings

GeoCom® Customer & Contacts disposes of a MS-Word integration which enables users to create mass mailings by WinWord without having to exit the database. Furthermore, already existing MS-Word letter templates can be used.

The advantage is: correspondence issues can not only be handled quickly and conveniently but they will also be embedded into the management information system as part of the application.

All letter templates can be formatted without any restrictions. And in order to avoid that Mr. Thompson becomes Mrs. Thompson address details like letter salutation, postal address and dates are maintained within the contact profile and will dynamically be attached to the letter body.

To every letter template a date for resubmission can be added.

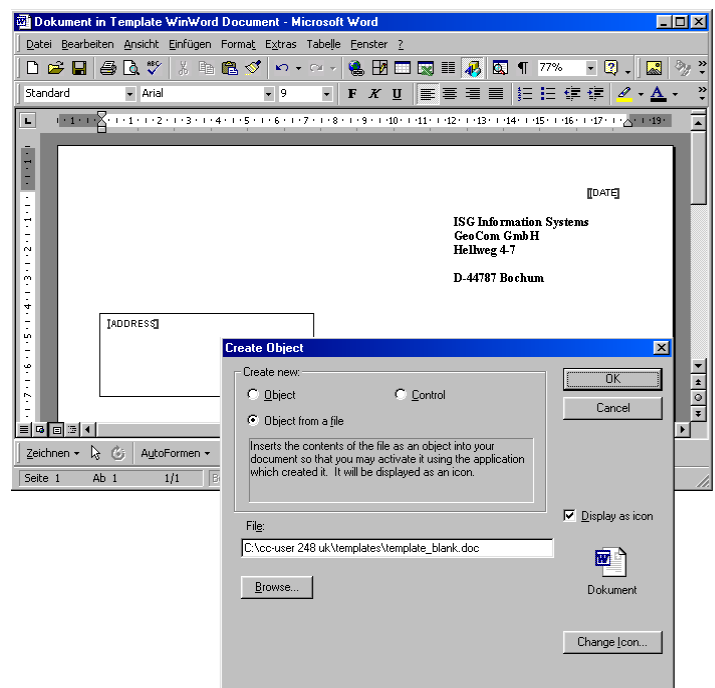


Illustration: Correspondence using MS-Word-letter template

## 5 Administration and configuration

Regarding to application and company specific extensions GeoCom® Customer & Contacts is structured openly and modularly. This guarantees that GeoCom® Customer & Contacts can always be integrated in already existing infrastructures and networks.

### **Central administration**

Besides the wide range of far-reaching data security functions for data processing (access rights and roles individually configurable) the whole sales information system can be administrated conveniently from a central location - this reduces the administration effort to a minimum.

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. Confidential information is absolutely safe and will be maintained confidential at any time.

### **Database handling**

The intuitive and easy database handling is not limited to the work within the customer management. Also the administration process is easy to handle. That means that updates can be implemented without interruption of the workflow. This not only facilitates the workflow but also enhances the performance of the administration system.

### **Variety of configuration parameters**

GeoCom® Customer & Contacts is configurable according to company specific standards and needs. Settings that should be valid for only a specific user group will be saved in the global configuration document. Additionally, every user can configure his user interface individually according to his/her personal needs (e.g. dialog language etc.). If wanted this individual configuration can also be adopted company widely (Policy).

## 6 Enhancements

Customer specific enhancements such as adjustments to the appropriate look-and-feel or the supply of further modules can be designed by **ISG Information Systems GeoCom GmbH**.

For more information: [www.geocom.de](http://www.geocom.de)