What is CRM and why would any business need it?

CRM is an acronym for Contact Relationship Management.

All the information relating to a customer forms the basis of a customer relationship package including information in your accounting system, email correspondence and other documents.

Today CRM is the term generally used to reference CRM software, this however is merely the tip of the iceberg. At its heart, CRM is much more than a technology product; CRM is about process – it is about how a business deals with its customers. A good CRM solution builds value by opening up vital communication channels and creating a common client-focused knowledgebase.

CRM

- Call, Email & Meeting History
- Accounting Software
- Marketing Results
- Customer Profiles
- Sales Tracking
- Calendar & Scheduling
- Reporting

Overall by effectively integrating your marketing, sales, and customer service functions, a good CRM system makes it easier for everyone inside your company to work together and share critical information that all comes together to keep your customers satisfied and loyal.

How can businesses benefit from CRM?

Provide a higher level of service. By knowing more about your customers' needs your business is equipped with the knowledge required to respond to queries in a timely and professional manner.

Provide the right product to the right customer. By keeping track of your customer's preferences you are given the advantage of knowing, or at least anticipating, what they want out of a given product or service.

Keep everyone in the business on the same page. Having information stored in one centralized place means your business can take ownership of your employee's customer knowledge. This means your business will not suffer if an employee is out for the day or leaves the organisation.

Measure business performance accurately. If everyone in your business is doing their job correctly and they're feeding the business's CRM database with the correct information then managers and business analysts can tap into an invaluable resource to analyse and report on how the business is performing. For example, you can analyse the rate of lead-to-customer conversions, why some prospects opt for a competitor's product, or how quick your staff responds to customer's enquiries.

Front to back office integration, 360° customer visibility and seamless data consistency throughout the business.

The new Accredo add-on for the ACT! Customer and Contact Manager offers larger organisations a more comprehensive workflow solution for streamlining sales, marketing and accounting information.

The **Xact Link for Accredo** enables the front office to back office workflow that small to medium business owners have been asking for, using everyday business software they are familiar with – no need for expensive corporate solutions.

ACT! plus the Accredo addon combines sales and marketing data about your prospects and customers with important account information – live. No synchronisation, no delays. The result is a centralised database that offers a complete view of your contacts, activities, sales opportunities and overall business performance.

Such intuitive integration eliminates errors, delays, manual intervention and additional paperwork typically associated with multiple databases, allowing your staff to focus on what is important – building relationships and getting results.

XACT ®
SOFTWARE SOLUTIONS

XACT ®
SOFTWARE SOLUTIONS

Accredo
taking care of business

How your business can benefit

Eliminate dual entry of records. Immediately populate ACT! with established records from accounts using the Import Wizard, then create and update Accredo companies/contacts from existing ACT! records with the click of a button.

Streamline business processes and improve workflow between the sales team (front office) and the accounting team (back office) to enable your business to become more efficient and more responsive to your customers.

Close more sales and better serve your customers. By combining sales history and purchase preferences in one place you can get a better view of your customers preferences and requirements.
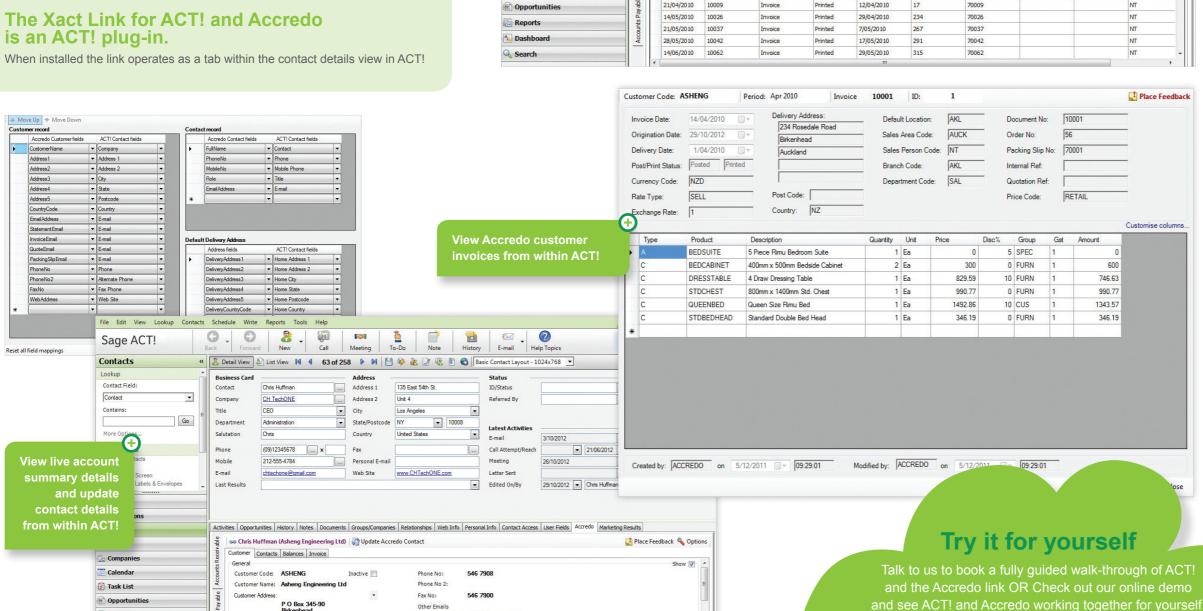
Give your marketing more meaning. Using the Accredo link to ensure all your contacts are in one place means you can ensure all your contacts are reached. Plus, combining financial data from Accredo with non-financial data from ACT! means you can implement highly targeted campaigns.

The Xact Link for ACT! and Accredo is an ACT! plug-in.

When installed the link operates as a tab within the contact details view in ACT!

View Accredo customer invoices and customise the view to display the columns you want to see from within ACT!

View Accredo customer invoices from within ACT!

View live account summary details and update contact details from within ACT!

Key features of the Xact link

1. Link ACT! Contacts to existing Accredo Customers or Contacts

2. Import multiple Accredo Customers and Contacts into ACT!

3. Create a new Accredo Customer or Contact from an ACT! record

4. Update Accredo Customer and Contact details from within ACT!

5. View Customer Account summaries and balances from within ACT!

6. View Accredo Invoices from within ACT!

7. Import Accredo Customer and Contact Memo's into ACT!

8. Link ACT! Contacts to Accredo Creditors

9. View Creditor Account Summaries and Balances from within ACT!

10. See a list of Creditor Purchase Orders from within ACT!

11. View the Accredo Contacts List for the currently linked Customer/Creditor

12. Choose which columns are displayed when viewing Invoices/Purchase Orders

Product roadmap

Future development for the product is still under review and will be largely dependent on user feedback. However future releases will include:

• Create Accredo Quotes and Invoices from within ACT!

• Print Accredo Sales Documents using custom templates.

Try it for yourself

Talk to us to book a fully guided walk-through of ACT! and the Accredo link OR Check out our online demo and see ACT! and Accredo working together for yourself.

**To book, visit our website:
www.xactsoftware.co.nz/demo**

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