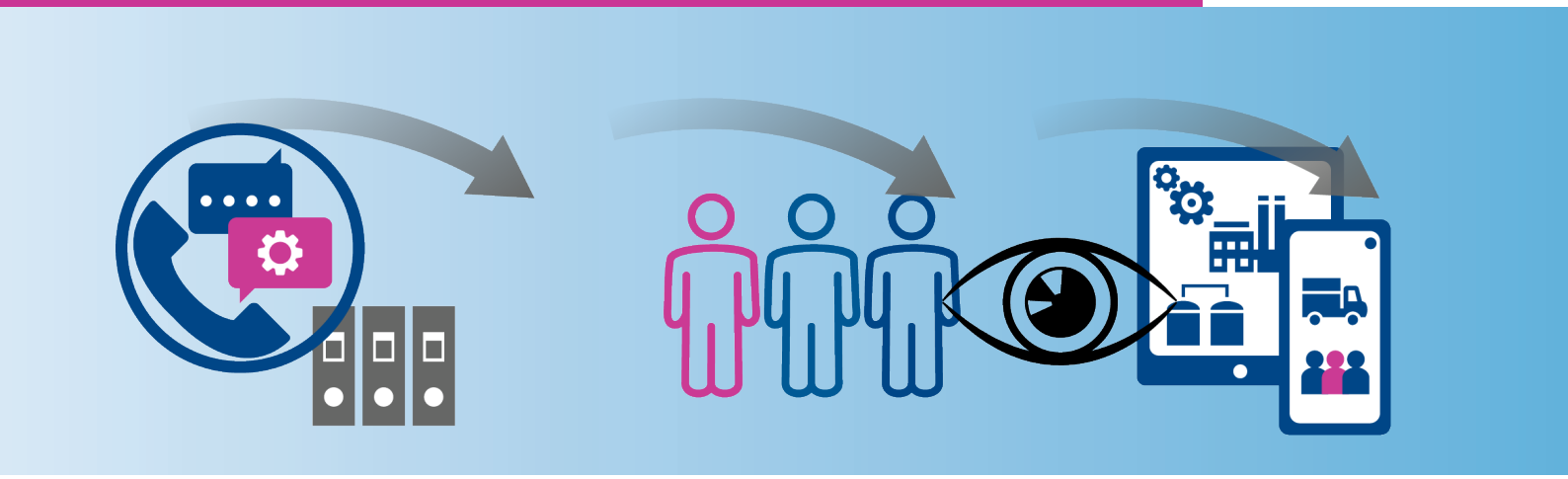
Base

CRM



Do you have the right overview of customers and activities?

To digitize your operations and manage your tasks, you need to link your activities to your customers or any other task source. This gives you a complete overview and the ability to create hierarchy and relations between objects, which is crucial for your task, quality and documentation management.

The CRM module is the heart of Microbizz. Here you have all your data objects. Objects can be customers, partners or even buildings or construction sites – or any other kind of object that you want to connect your activities and files to.

On each object you can connect a number of information, activities and files, i.e. tasks, time, people, invoices, procedures, forms and much more, and also relations to other objects in the system. All in one common file structure.

In this way, your activites and files are always connected to the right company or object, and you can get a complete overview on each object as well as create reports based on different parameters.

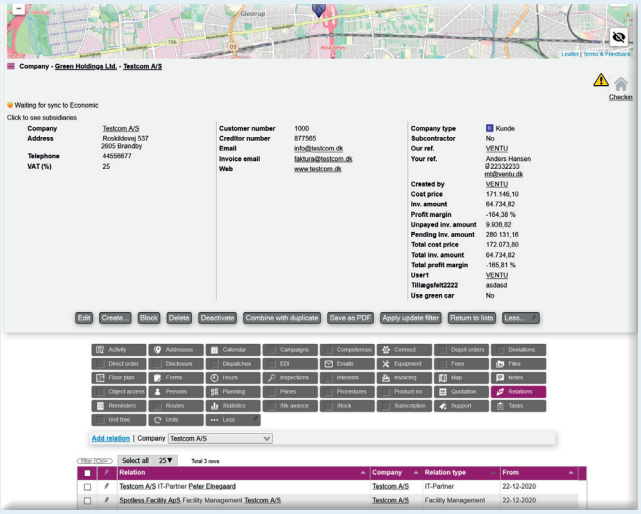
Persons and contacts
In Microbizz, you view all your persons and contacts at your customers and suppliers and you can keep track of your active and past contacts and connections. Contact information can include name, email, phone, notes, files, etc.

You can divide contacts in different person roles and control accesses or automatic mailings to them. Examples on roles could be decision makers, residents, quality assurance recipients or task commissioners.

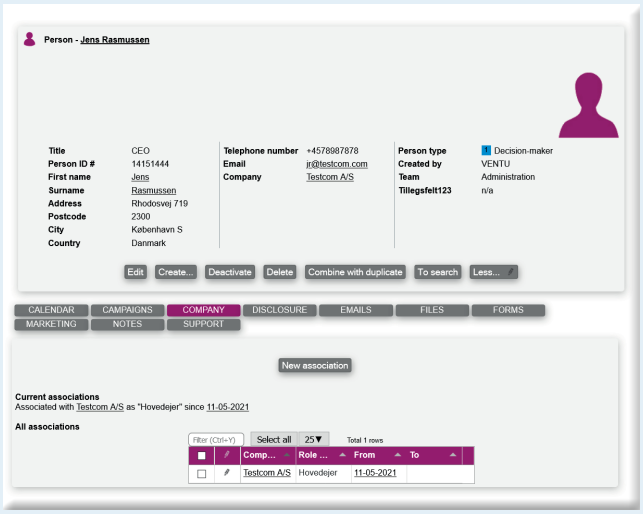
Functionality

- Get an overview of all your customers, contacts and task sources
- See information about your customers – persons, person roles
- See tasks and time consumption
- Get an overview of activities – current and past activities
- See completed forms
- Find all documentation, emails sent etc
- Create customer directory hierarchy and groupings
- **Register price advances and discounts**
- See invoices, credit notes and settlements
- Create relationships with other customers and companies using subject areas

CRM



Company hierarchy and relations



Personal data card

Benefits

Overview, data quality and less administration

Having all your customer data in one solution saves time and improves the possibilities for ensuring data quality.

Transparency and reporting

Linking all activities and tasks to the right customer or object ensures, that you always have complete transparency on your operations, and the ability to create relevant reports at any time.

Increase productivity

With the CRM module, you ensure that your staff have access to the right information, when they need it – 24/7 from any device. That saves time and directly affects your productivity.

Less errors

By having one common structure on your objects and files, you will much easier find the information, and you reduce the risk of errors.

For more information, please contact:

info@ventu.dk

Visit our knowledge base in **Micropedia** to find detailed information and documentation on functionality and usage of Microbizz modules
LINK

12/11/23