1.1 Examples of vtenext application areas

Customer Acquisition & Sales

- Automated acquisition of potential accounts via contact webform; Lists allocation to sales personnel concerned;
- Management of corporate hierarchies, partners, etc.;
- Shared calendar to plan customer actions; Sales negotiations management with forecast reports;
- Sales and administration steps management: Quotes, Sales Orders, Invoices, Delivery Notes;
- Exportation to PDF of offers, invoices, etc. with customised forms.

Communication & Marketing

- Management of multiple personal mailboxes;
- Mail and link conversion towards other CRM objects;
- Target management (segments) of customers database according to key-information;
- Transmission of newsletters and campaign statistics;
- Internal communications through Conversations linked to CRM entities. → Talks

Customer Service & Projects

- Customer assets management: installed products and pending contracts;
- Collection of after-sales requests through different channels;
- Management of queued work processes and SLA times;
- Online customer portal for direct communications and documents sharing;
- Activities tracking and resources scheduling;
- Orders management through Projects, Operations, Deadlines and Gantt charts. → Project Tasks – Milestones

Reports & advanced tools

- Reports and charts on all data in the CRM;
- Notification management system on both hierarchical and personal basis for users (Groups, Roles and Profiles);
- Privileges and security administration through advanced rules and exceptions; CRM layout customisation;
- Workflows (automations);

- Creation of interface side customised modules; Schedulable data importation from database;
- Report and supervision of user activities and accesses.

BPMN and company processes mapping:

- Improve company efficiency;
- Execution of company procedures in standard and unequivocal manner;
- Reduction of human error;
- Reduction of execution times;
- Checking of bottlenecks in the organisation;
- Reduction of procedure learning times;

Revision #2
Created 2022-05-25 17:25:32 UTC by Alberto
Updated 2022-11-03 13:28:32 UTC