Distribution & Supply Chain Module
Customer Relationship Management (CRM)
Fitrix ERP Distribution & Supply Chain Module

"Everybody in the company touches it (Fitrix), which is the whole purpose of an ERP system. It's clear we wouldn't have been able to do the kind of business we're doing right now without the package."

John Maydonovitch
President and CEO
MCE, Inc.

Functions within a business organization are often referred to as 'front-office' or 'back-office' depending upon whether they are 'customer-facing' like an inside sales group or a customer support call center, or are more internally- or supplier-oriented like accounting/finance, purchasing or manufacturing. Fitrix ERP's Customer Relationship Management or CRM system addresses the former, and includes capabilities that are intended to help 'customer facing' departments in the company like sales, marketing and customer service/support do their day-to-day jobs.

The main focus of a CRM system is to help ensure that customer needs are met in a timely and efficient manner, so that customer satisfaction is maintained a high levels throughout the organization and with every customer interaction, and so that the company's revenue and profitability goals are able to be met or exceeded. By having CRM integrated with an ERP system, it is possible to gain and maintain a '360 degree view' of your company's customers and to support analysis which helps identify your most important and profitable customers, as well as your less profitable and more costly ones.

The Fitrix Customer Relationship Management module is designed to meet the most critical needs of the three main 'front office' constituents:

• Sales,
• Marketing, and
• Service/support personnel.

Since companies often vary greatly as to how these operations are organized, all of Fitrix CRM's functions within each of these areas may or may not be utilized by your company, or might be implemented in a 'hybrid' manner to best meet your business objectives. Certain functions like Activity Management might be used by all users in all of these departments, or just those in one or two.

There are sophisticated applications that are designed to be 'best in class' individual or suite-based CRM solutions that include more specialized capabilities than Fitrix CRM has at this time. Fitrix CRM is designed to meet the core CRM needs of the typical discrete manufacturer or wholesale distributor, and to provide close integration between these core CRM capabilities and the other ERP functionality provided within the Fitrix software suite. With this CRM/ERP integration, a '360 degree view' of your customers and their individual impact on your operations and profitability can be accurately measured and optimized over time.

Customer Relationship Management (CRM)

Be able to see at a glance the whole picture for your leads and customers, be it open proposals or quotes, active campaigns, open orders, or support cases.

Fitrix Customer Relations Management (CRM) seamlessly integrates with all Fitrix Business modules.

Features/Function Highlights

Modular Integration – Direct integration with other Fitrix ERP modules

Account Management – Fitrix CRM allows users to enter and maintain various demographic and other information about suspects, prospects and customers, and even other organizations like business partners, associations and competitors. Companies can be organized into hierarchies to track the 'parent-child' relationships of parent companies and subsidiaries at multiple levels.

Contact Management – An unlimited number of contacts can be maintained for each company/account, with one being designated as 'primary' for each Account. Multiple phone numbers, email addresses and physical addresses can be managed for each contact.

Lead & Opportunity Management – Fitrix CRM's Lead and Opportunity management capabilities allow sales and marketing personnel to track interactions and interest with Accounts from the very first (e.g. a trade show 'lead') to multiple individual sales opportunities for different products or services the Account may be interested in, with forecasting and tracking.

Quotes & Proposal Management – With Fitrix CRM you can quickly and easily see quotes and proposals that you have sent your prospects and customers and turn these into sales orders when they are sold.

Team Selling Support – Fitrix is designed with team selling capabilities built in that will continue to be enhanced over time to support a robust 'role-based' multi-member Account team model that is typical in more sophisticated sales organizations, but can also be used in more simplified settings with single-member or small sales teams.

Activity & Project Management – Fitrix CRM lets users manages all kinds of Activities within Fitrix like calls, appointments, 'to-do's as well as build their own specialized types of Activities and track them. Projects are templates of reusable sets of Activities that can be scheduled and assigned to all or just Primary Contacts using Fitrix CRM's Campaigns features.
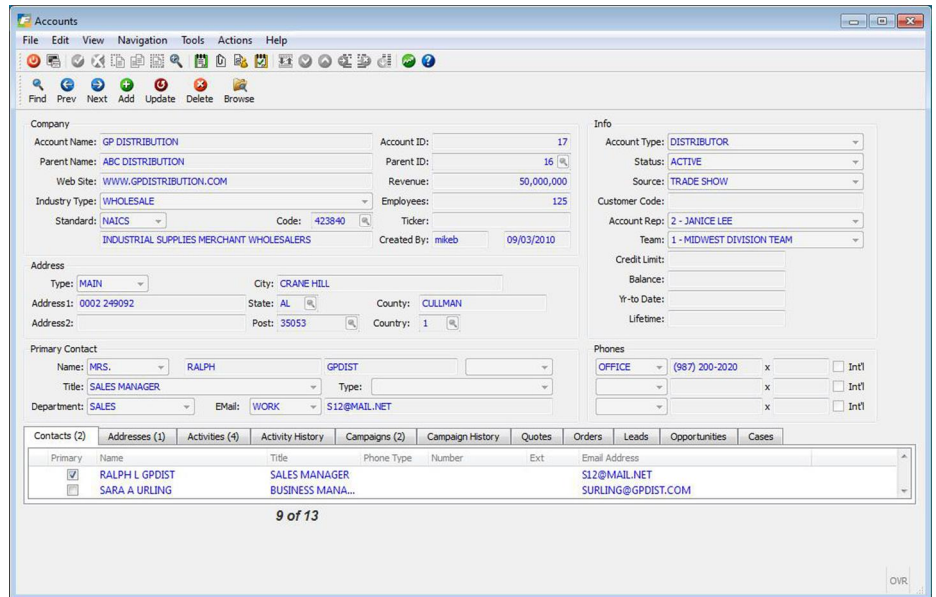
Features/Function Highlights

Campaign Management – Fitrix CRM's Campaigns capabilities allow sales, marketing and service/support teams to build robust 'multi-media/multi-modal' campaigns that can be scheduled, assigned and managed to various lists of Accounts based on user-defined criteria.

List & Query Management – The CRM module of Fitrix ERP allows users with proper access the ability to build, use and reuse powerful SQL queries via a standard Query By Example query capability. These lists can then drive Campaigns or feed other applications targeting prospects and/or customers with your company's communications or other interactions.

Case/Incident Management – Fitrix CRM includes a powerful Case Management capability that allows customer service/support personnel to track and manage cases/calls/incidents/issues/etc. Help desk or call center users can assign cases to the most competent/available personnel using a rules-based facility.

Problem Management – Tracking problems and identifying trends so that major customer service issues can be addressed proactively is an important feature that Fitrix CRM's Problem management feature helps automate.

Sales Lead & Support Call Dispatch – Rules can be set up within Fitrix CRM that determine how new sales leads and new support cases are assigned or dispatched, based on factors such as geography or skill set of agents.