

CRM & WORKFLOWS

✓ *WinLine CRM enables automated work processes throughout all your departments with integrated workflow management.*

WinLine CRM has two central core functions: first, it serves to set up and manage first-class customer relationships and secondly, it enables the digitalization and automation of work processes in your company.



CRM optimizes customer relations

WinLine CRM supports you in daily data management and supplies your employees in all departments up-to-date and comprehensive information on customers, prospective customers and contact persons. This provides the optimal basis for individualized customer service

at all customer interface points, in turn providing the foundation for successful business operations.

Customized digital workflows and automated business workflows

The core of the WinLine CRM system is an integrated workflow manager (WFM). Custom-tailored workflows for your company are set up here, running on an automated basis.

Recurring activities, in particular, can be automated in a quick, efficient and transparent manner with these kinds of workflows. Automation of tedious work processes increases worker satisfaction as an added bonus, leaving your employees with more time for complex and creative tasks.



As a core module of the WinLine complete software suite, WinLine CRM supports daily activities in your entire company:

- + Integrated in the WinLine ERP suite
- + Integrated workflow management
- + Set up of individualized, automated processes
- + Management of all customer processes
- + 360° overview: all information on customers, prospects, contacts, and projects in real time
- + Optimal access to customer history
- + Standardization of recurring activities
- + Introduction of Social Collaboration
- + Mobile, cross-company processing

More information on WinLine CRM - Customer Relationship Management can be found on our website: www.mesonic.com.

SUCCESS FACTOR WORKFLOW

✓ *Organize, steer and monitor your internal company processes with workflows.*



Integrated workflow management - the core feature of WinLine CRM

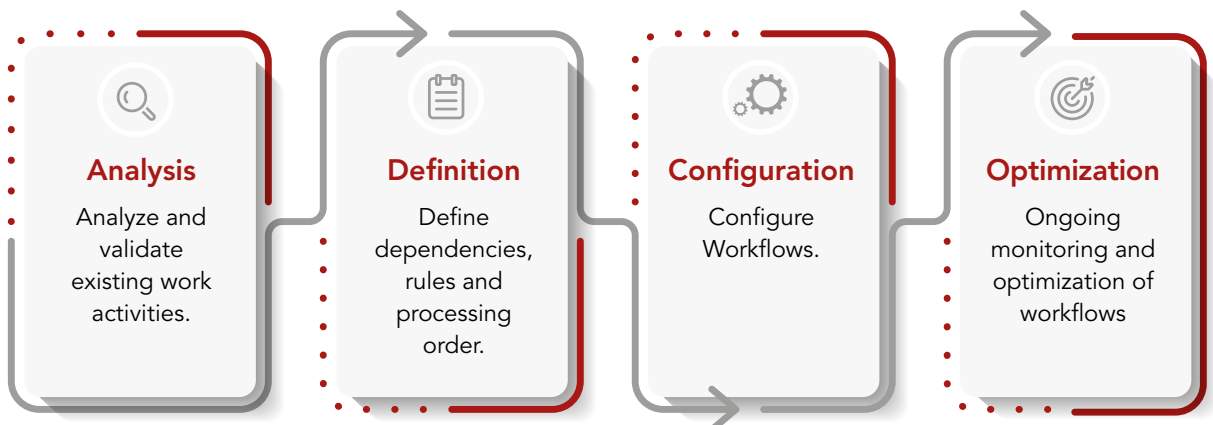
The integrated workflow management tool is the main component of WinLine CRM. This is where you configure workflow and workflow steps for automating recurring processes in your company by setting up rules, authorizations, forwarding schemes, alerts, etc.

In this manner, you can automate and standardize many kinds of processes from all areas of your company. Recurring activities are thus quickly and securely completed, while at the same time conserving resources and lowering costs.

Advantages of workflow management:

- + Automation, standardization and streamlining of work processes
- + Reduce costs and processing time
- + Improved flow of information
- + Error reduction
- + Flexible work processes of high quality
- + Optimization of event and task monitoring
- + High transparency at all times through documentation, processing status, and reporting functions

WORKFLOW PROCESSING



RETHINK PROCESSES



TASK AND EVENT MANAGEMENT

Automate your task management and manage events, calls, tasks, sales activities, etc., for yourself, other individuals, or entire groups. Set up automatic follow-up alerts to ensure that no item is neglected.

Highlights:

- + Overview of personal and group To-Dos
- + Follow-up alerts, reminders, escalation dates
- + Calendar synchronization with Microsoft Outlook
- + Insertion of To-Dos, Events, Lists, Calendars etc. into the WinLine Cockpit



360°-CONTACT INFORMATION

You can't get more information than this: Call up quotes, sales, notes, agreements, contracts, projects, customer conditions and discounts, open items, etc. at the click of a button. Integration with the WinLine ERP modules lets you see up-to-date stock levels and delivery times to assist in replying to requests for information.

Highlights:

- + All customer, vendor and contact person information at your finger tips
- + Chronological customer history
- + Simple-to-use search functions
- + Increased availability of information
- + Real-time data



CUSTOMER ACQUISITION

Using lead tracking you can monitor your customer's activities from the first contact to the conclusion of contract, and resulting post-sales activities. Contact persons, contact data, customer history, sales reports, service tickets, and processing status are just a few of the kinds of information that allow you to plan special offers, discount sales, and many other types of follow-up actions. Sales and marketing campaigns can be organized and monitored with the integrated Campaign Management module.

Highlights:

- + Monitoring of customer/turnover development
- + Sales opportunity analysis at the press of a button
- + Seamless lead management
- + Campaign management and monitoring
- + Email monitoring with WinLine MTA module (conforming to data protection regulations)
- + Assisted target group selection
- + Assisted custom list generation



CUSTOMER SERVICE

Solutions and products become more comparable, and quicker, more customer-friendly service comes into focus. You can perform customer service, repairs handling, claims management, support and consulting activities, as well as related event planning (external workforce, technicians, etc.) on an individual, speedy and dependable basis.

Highlights:

- + Speedy processing of service/warranty requests
- + Ticketing system configuration
- + Automatic reminders, warnings, messages
- + Targeted processing order for tasks
- + Precise cost calculations through actual work time recording and association
- + Support for external work force with mobile access



INTERNAL ORGANIZATION

Tune up the internal processes in your company and maintain a clear overview of projects, contracts, company fleet operations. Further, you can automate internal order processes or manage vacation, training, or budgeting requests quickly and automatically.

Highlights:

- + Internal order request, management and release management
- + Contract management, e.g., for leasing, cell phone contracts, etc.
- + Realization of a fleet management or facility management system
- + Procurement management
- + Application acceptance procedures

CRM & WORKFLOWS - MORE HIGHLIGHTS

Maximum flexibility - this is what characterizes WinLine CRM. There are other factors that also play a decisive role along with the integrated workflow management features.

+ Total ERP integration with workflows

WinLine CRM and WinLine ERP use the same data from the same database. This achieves maximum leverage: access information from the ERP system in WinLine CRM such as product data, stock levels, delivery or manufacturing times, payment and discount conditions, open items, etc. In the ERP system you have direct access on the other hand to data that has been generated in the CRM module. The software offers a systematic view of your market readiness by revealing customer growth potentials and weaknesses. A crucial added bonus from the customer and vendor perspective!

+ „ready to go“

WinLine CRM can be used right from the start. It is easy to use and handle. You simply register the program license and begin with your first actions.

+ Social Collaboration platform

The WinLine SMART SHARE platform allows quick, transparent and uncomplicated communication within WinLine CRM. The on-board WinLine interactive social collaboration platform offers various possibilities for group interaction, e.g., chat or discussion forums, placing centralized teamwork up from and center. Use WinLine SMART SHARE to stay networked with your team at all times.

+ Everything at a glance

All events, tasks, lists and calendars can be displayed in the WinLine Cockpit for maximum visibility. The WinLine Cockpit is your individually configurable central dashboard in WinLine. No more forgotten items!

+ Mobile Access

Requests can be answered with mobile access by smartphone or tablet device with WinLine CRM. You can also enter data in WinLine CRM or WinLine ERP with mobile access. Everything in real time using mesonic programmed apps.

+ Cloud compatibility

You would like to host WinLine CRM in a computing warehouse? No problem - like all WinLine programs, the entire CRM system can be employed in your private cloud

+ MS Office integration

Re-process your WinLine data in your favorite MS Office application and send email campaigns, for example, with Microsoft Outlook, print serial letters in Microsoft Word, or output report data directly to Microsoft Excel. .

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