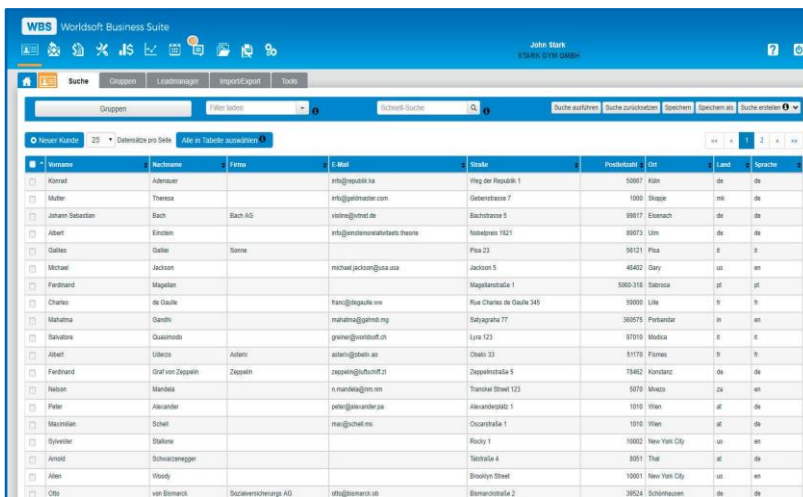


CRM - Customer Relationship Management

The CRM of the Worldsoft Business Suite saves you time and work and optimises your marketing and administration.

You have more important things to do than maintain data in various programmes, process Internet enquiries by hand and struggle with the operation of different programmes. Instead, you want efficient, time-saving processes and to optimise your administration and marketing without a great deal of technical and personnel effort.

With the CRM of the Worldsoft Business Suite, you can automate the answering of enquiries via the Internet, respond faster, communicate in a targeted manner, save time and have all relevant information in one place.



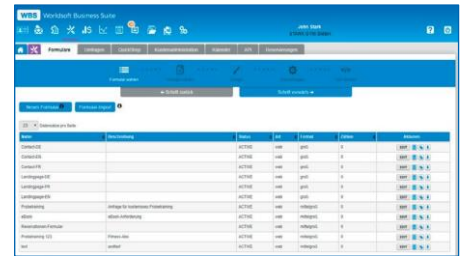
Vorname	Nachname	Firma	E-Mail	Strasse	Postleitzahl	Ort	Land	Sprache
Konrad	Alexander		info@konrad.ch	Weg der Republik 1	5097	König	de	de
Müller	Thomas		info@getreide.com	Güterstrasse 7	1000	Berlin	de	de
Jonas Sebastian	Bach	Bach AG	info@bach.de	Waldstrasse 5	99017	Eisenach	de	de
Albert	Ernst		info@ernst-waldschmidt.de	Nobelpreis 1021	89073	Ulm	de	de
Galles	Ottavio	Sonne		Place 23	56121	Pisa	it	it
Michael	Jackson		michael.jackson@usa.usa	Jackson 5	46402	Gay	us	en
Ferdinand	Magellan			Magellanstrasse 1	5083318	Sabrosa	pt	pt
Charles	de Gaulle		franc@gaulle.me	Rue Charles de Gaulle 345	59000	Lille	fr	fr
Mahatma	Gandhi		mahatma@gandhi.org	Satyagrah 77	360575	Portbandar	in	en
Salvatore	Quasimodo		salvatore@quasimodo.ch	Lys 123	67010	Modica	it	it
Albert	Ulecia	Adwin	adwin@ulecia.as	Obale 33	51179	Firmes	fr	fr
Ferdinand	Graf von Zeppelin	Zeppelin	zeppelin@luftschiff.de	Zeppelinstrasse 5	79462	Konstanz	de	de
Nelson	Mandela		n.mandela@nelson.org	Tankard Street 123	5070	Shelton	za	en
Peter	Alexander		peter@alexander.de	Alexanderplatz 1	1010	Berlin	de	de
Maximilian	Schell		max@schell.me	Circumstrasse 1	1010	Berlin	de	de
Spyker	Staline			Stalin 1	10002	New York City	us	en
Arnold	Schwarzegger			Waldstrasse 4	8051	Zürich	de	de
Allen	Wood			Brooklyn Street	10001	New York City	us	en
City	von Bismarck	Sozialversicherung AG	info@bismarck.de	Bismarckstrasse 2	30254	Düsseldorf	de	de

Entries on your website such as enquiries, reservations, orders etc. flow DIRECTLY into the CRM. The correct email or SMS is automatically sent in response, the enquiry is logged and correctly coded.

Seize the opportunity to stand out from the competition with a professional CRM. Your valuable customers will be more satisfied and more loyal to your company. The Worldsoft CRM is a powerful system, yet it is quick to learn and easy to use.

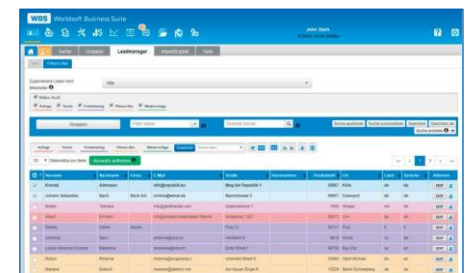
WebConnector

The WebConnector connects any website with your CRM. You do not need an interface or any programming knowledge to connect.



Lead-Manager

The lead manager organises sales and is an efficient tool for selling more and implementing proactive customer management and marketing.



Reservations

The reservation system allows customers to book online on your website. The notification to you and the confirmation to the customer by e-mail or SMS.



CRM - Customer Relationship Management

General information:

- Arrangement of the navigation tabs via drag & drop
- Standardised user interface and detailed online help
- User language (German, English, French)
- Permitted languages and countries (all possible)
- Interface documentation (API), apps, WebHooks and Webinars
- Expansion through EMS, Factura and Affiliate possible

Basic settings:

- Access code can be changed at any time
- Free entry of company data
- User administration with assignment of rights (e.g. employees)
- Time zones, date format, hour format and start of week
- External e-mail for notifications can be set
- Free data fields can be defined (e.g. car brand)
- Multilingual salutations (can be added and changed)
- Multilingual macro management (placeholders)
- Upload company logo for documents and customer admin
- Overview of data usage and upgrade function
- Create backups and import backups
- Document settings with footer macro
- Customisable customer overview
- Customisable display of contact data in customer overview
- Customisable display of info blocks in customer overview

Contact data management:

- Enter / display / edit addresses
- Registered and unregistered addresses possible
- Group management (group coding)
- Process assignment to groups
- Quick search
- Search for groups
- Create and save search filters for reuse
- Address selection in table (multiple functions): Send e-mail, SMS and letter template, add or remove groups, newsletter and lead manager assignment, change data
- Address overview: contact details, bank information, delivery addresses, documents, group codes, article groups, messages, comments, subscriptions, affiliates, newsletters, Factura documents
- Direct e-mail dispatch, e-mail from templates, SMS and letter templates and Factura document creation
- Import and export addresses (ISO or UTF-8 in CSV format)
- Duplicate search and synchronisation

Custom-Administration:

- Registered addresses with password-protected online access
- Receive and send messages (between company and customer)
- Profile management
- Invoice overview with payment option (Factura)
- Internal area for affiliates (Affiliate)

Template management:

- Create any number of e-mail templates (HTML and text)
- Sample templates for e-mails (HTML)
- Create and manage any number of SMS templates
- Create and manage any number of letters (PDF)
- Sample templates for letters
- System emails (can be changed if required)
- Change, create and manage Factura templates

News module:

- Inbox and outbox for internal messages (system, employees)
- Inbox and outbox for customer messages (for customer admin)
- Customer e-mails with WBS system (local and outbox)
- Display of form entries

File manager (archiv):

- All archives with search function
- Company files
- Images
- Customer files with customer assignment
- Article images
- Widget images (for externally integrated content, e.g. forms)
- Generated files (e.g. PDF circulars)
- E-mail attachments

Forms (WebConnector):

- Creation and management of any number of forms
- Form import of WBS forms
- Templates for contact forms
- Form design via drag & drop of form fields
- Free design of forms using HTML fields
- Preview function
- Double opt-in
- No captcha required thanks to token system
- Forms are automatically responsive
- Page break for multi-level forms
- Payment settings
- Additional fields (see basic settings for free data fields)
- Meta title
- Thank you page (URL or thank you text)
- Insert iFrame or embedded on website
- Automatic notification
- Automatic processes (group coding, e-mail dispatch, etc.)
- Direct link or script link for embedding on the website

Lead manager:

- Free status assignment with colour coding
- Assignment of a WBS calendar for appointments
- Assignment of group coding
- Lead overview by employee and employee assignment
- Notes and resubmission in calendar
- Send e-mail, PDF and SMS

Calendar:

- Time zone, date and hour format, working days
- Calendar for employees with access rights
- Import via URL or .ics file
- Synchronisation with Google Calendar
- Export as .ics file or URL
- Calendar views (month, year, day, week, events, reservations)

Reservation:

- Various reservation systems adjustable
- Sample systems for consultants, restaurants, seminars, hotels, hairdressers, car hire, surf courses, car garages, delivery services
- Working days, opening hours and exceptions can be defined
- Settings: Calendar, events, time intervals, quantity, articles and options
- Notification: E-mail/SMS to owner and customer
- Preview
- Direct link and script for source code for installation on website

Statistics:

- - Address statistics in figures and graphics (month, groups)
- - Lead manager statistics: project, month, employee, status
- - Freely definable filter statistics
- - User-defined statistics