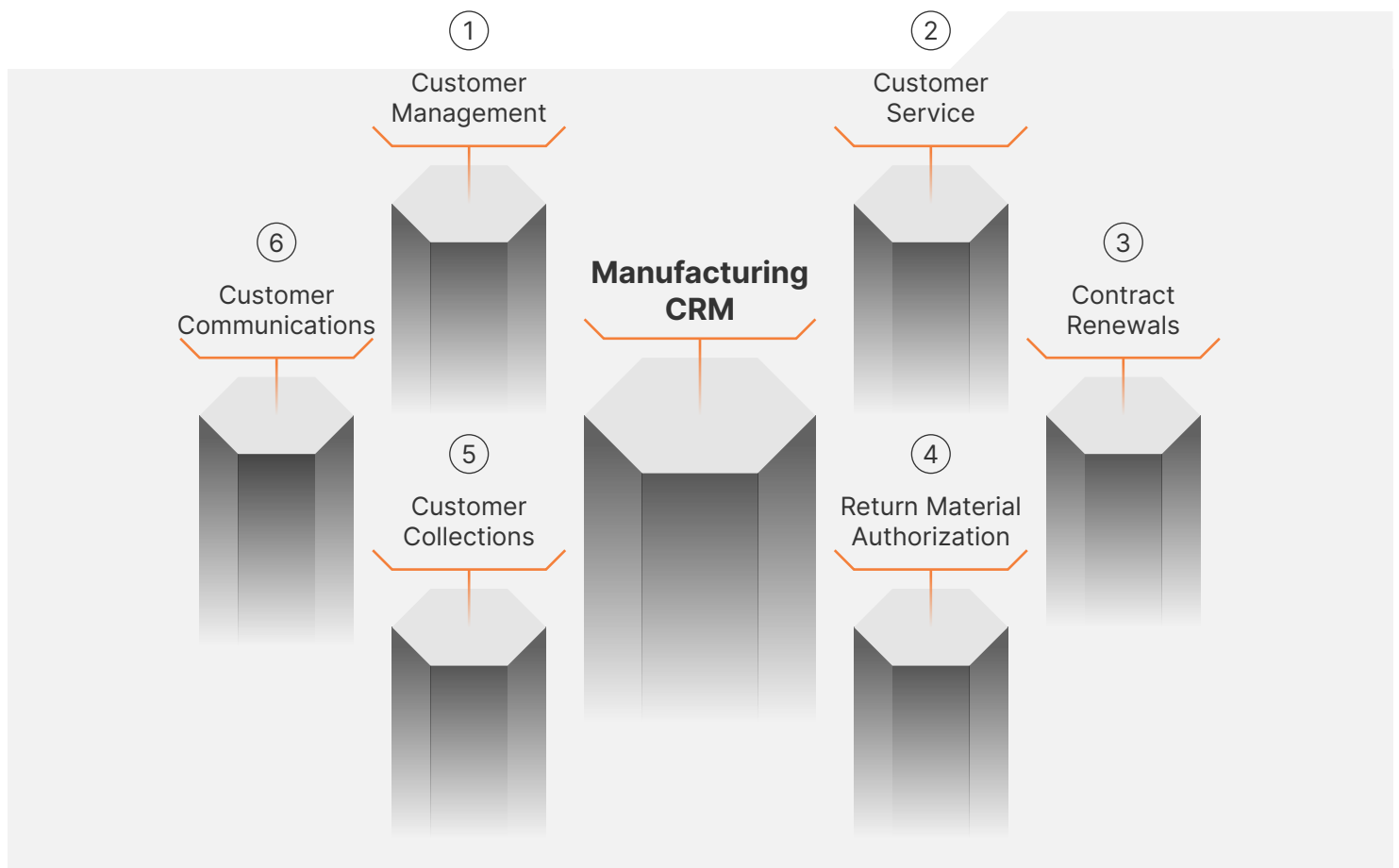


"The Customer Service module streamlined our entire parts and service process reducing our departmental costs by 30%."

Ron Bonner, President, North American Pet Products.

Manufacturing CRM: Providing Exceptional Experiences



Provide exceptional customer experiences from prospecting through to after sales service.

In today's challenging market, excellent customer relations can be a significant differentiator between you and your competition. Whether you're in the early stages of your customer relationship or have a long established one, INDUSTRIOS provides you with the tools you need from the time you first initiate contact to long after you've made the sale. Create customers for life with INDUSTRIOS.

1 Customer Management

Need quick answers to your customers' questions?

All answers in one place.

Let INDUSTRIOS help you give your customers a quick and informative response. With full access to all quotes, sales orders, jobs, shipment, invoices, activity history and email, you have everything you need at your fingertips. With extensive drill down capability you have access to all the details relevant to a customer's question. Gone are the days of searching for someone that has the answer. You'll be able to answer your customer's questions quickly when they ask.

Do you need better account control to avoid costly errors?

Never ship to "credit hold" customers or give the wrong discounts again.

Use INDUSTRIOS' account status to clearly define the disposition of an account and control the type of transactions processed when an account is in a particular status. With the ability to define account types and set defaults, you not only streamline data entry on new and prospective accounts, you also ensure the accounts are set up consistently. The account type lets you control credit check rules, discounts allowed, pricing, payment and taxation rules, etc. Giving you control will save you costly errors during processing later.

2 Customer Service Management

Are your customers waiting too long or being forgotten when they report an issue?

[Never overlook a customer again.](#)

Use service tickets to track and define all your customers' issues in INDUSTRIOS' Customer Service Management. With all activity related to the issue centrally recorded you can ensure fast, efficient service. By using the built in automation, you can communicate changes as the ticket progresses to those on the service team and to the customer, and with severities and priorities you can focus your efforts to ensure the most important issues are addressed in a timely fashion before they become bigger issues.

Is your billable service revenue suffering?

[Tracking and billing your services.](#)

If your service is billable then you need the tools INDUSTRIOS provides to track time, materials and expenses related to resolving an issue, and a streamlined method for managing the invoicing process. In addition, if an item is covered under a warranty or service contract you'll know, and be able to ensure that those customers are not billed. With INDUSTRIOS you'll capture the billable service revenue and keep your warranty or service customers satisfied too.

3 Contract Renewals Warranty and Service

Is it difficult to track your customers' warranties and service plans?

[Integrate sales, warranty and service plans.](#)

With INDUSTRIOS tracking warranties and service plans couldn't be easier. When you record an item on the sales order, the system can automatically add the applicable warranty and/or service plan to the order. Want to up-sell the service plan? No problem, just select from the list of plans available for the item. Once you complete the order you'll have an up-to-date record in the customer's account of all warranty and service plans, along with applicable renewal dates. Each plan details the type of coverage and whether any additional billing would apply when an issue is reported. No searching paper files, everything you need is accessible from the account.

Are you missing service plan renewal opportunities?

[Automate your renewal process.](#)

Never miss a renewal opportunity again. Easily generate your renewals daily, weekly or monthly and easily manage the renewals through a central workbench. Track and monitor each step in your renewal process until the new contracts are approved and invoiced.



"The INDUSTRIOS RMA Module is fantastic! We finally have an RMA system that links up to every aspect of the business. The process flow is very smooth, and all the information regarding returned items is accessible to everyone -- including the accounting department!"

Gloria Marchand, Controller, Security Door Controls.

4

Return Material Authorization

Are customer returns, repairs and replacements a nightmare to process?

Define the rules and manage with ease.

With numerous decisions to be made during the RMA process, wouldn't it be helpful if everyone followed the same set of rules? RMA integrates with credit memo, sales order, purchasing, and work order to allow a seamless and effortless decision-making process for categorizing and documenting a customer return, repair or replacement. You define the rules up front so there is no question about what can be sent back, how an item is to be handled when it arrives, and how to process any associated invoicing or credits. With one set of rules your customers receive goods that meet their expectations with minimal delay.

Are you losing billable revenue on repairs?

Easily invoice time, materials and expenses.

Take advantage of INDUSTRIOS' RMA module to track time, material and expenses related to a repair and the seamless integration to easily create the invoice. Plus, if the repair is covered under a warranty or service contract you'll know that up front so you don't inadvertently bill for a covered repair.

5

Customer Collections

Do unpaid invoices get overlooked until they are far overdue?

Get paid earlier with little effort.

Make collections an automated, rules based task to quickly generate the list of accounts you need to focus your collection efforts on, and automatically email dunning letters and statements for your follow up collection calls. With all collection information centrally located you can manage the collection calls, record activity and schedule follow up actions quickly and easily. No more sorting through lengthy AR reports to identify the past due accounts, you can get started on collecting right away.

Is it a time-consuming chore to clear small "on account" balances?

Write down or write off easily.

Make clearing small "on account" balances an easy task. Use the Small Balance Calculation and Adjustment functionality to easily identify the small balances you'd like to clear, and whether you want to write them down or write off, and why. During processing INDUSTRIOS creates the transactions necessary to clear the balances providing you with an audit trail. Make a time-consuming chore a task that takes minutes.

6

Customer Communications

Do you need a centralized area for all your customer communications?

Customer accounts have the complete picture.

Leverage INDUSTRIOS' email integration to easily maintain a complete record of all communications between your company and your customers. The customer account stores a record of each email sent and received and if needed, you can link emails to a specific record within the system for better traceability.

Would you like to streamline standard communications?

Explore automation and mail merge.

Save additional time while maintaining superior customer communications using email templates and mail merge capabilities to communicate changes in service ticket status, upcoming service plan renewals and impending warranty plan expirations, and many other communications. If you need to promote your product or services then an eye-catching HTML email can capture your customers' attention, while allowing you to simultaneously schedule follow up appointments for your team. Whether promoting your company or communicating standard messages, mail merge and scheduling will streamline this process significantly.



Keeping Your Customers Satisfied.

We make it easy for you.

Customer Management

- Speed up data entry and improve consistency by classifying customers and prospects into groupings that are meaningful to your business.
- Centrally manage all account details including: classifications, payment, credit, shipping, taxes, pricing, invoicing, and carrier.
- Effortlessly review customer activity; sales orders, shipments, invoices, credit memos, production and a complete customer account profile.
- Easily record customer appointments.
- Automatically track email communications with each customer using the MS Outlook integration.
- Effectively manage transactions allowed on an account through user-defined account statuses.

Customer Service Management

- Easily capture the customer's service and repair issue, verify service or warranty status at time of entry, and create a work order.
- Efficiently track a service ticket's status from the time a problem is recorded through to closure.
- Effectively communicate ticket progress with personalized communication using standard communication templates.

Warranty and Service Plans

- Simply identify the default service or warranty plan for an item so the plan is automatically added to a sales order when the item is ordered.
- Readily establish warranties for items including: length of warranty, default plan start date, warranty coverage i.e. material, labor, expenses.
- Effortlessly define the different service plans you offer including; length of plan, default start date, plan numbering format, plan pricing calculation, and provides the ability to pro-rate the plan.
- Quickly identify service plans due for renewal and easily activate renewals once customer approval is received, generate the invoice, and finally update items owned on the account.

Return Material Authorization

- Effectively tailor your own policy as it relates to customer qualifications, credit guidelines, and time lines for returns.
- Effortlessly manage returned goods through your RMA process ensuring goods are properly received, inspected and disposed according to your defined rules through to closure.
- Quickly issue RMA forms to customers authorizing goods for return and providing detailed return instructions, warranty and service plan coverage, and the reason for return.
- Easily create replacement purchase orders, work orders, or shipments from inventory before even receiving the returned goods.
- Simply raise a replacement work order through integration to sales order and production for items to be replaced instead of repaired.

Customer Collections

- Effortlessly select customers for collection based on dozens of criteria including aging date, aging brackets and overdue balance.
- Schedule collection generation on a user-defined frequency.
- Centrally track all customer data, collection calls, emails, faxes, AR history, payments, invoices and disputes.
- Automatically generate and assign appointments for collection calls.
- Easily generate dunning letters, statements, and collection call listings.
- Automatically remove the relevant collection appointments from the calendar when invoices are paid.

Customer Communications

- Automatically capture emails received in Microsoft Outlook® and automatically update the customer's account history with the email.
- Easily create emails from within INDUSTRIOS and have those emails automatically sent via Microsoft Outlook® and have a record of the communication in your Microsoft Outlook® Sent Email folder.
- Save time with mail merge functionality that enables you to record sent emails as an activity in the customer's account and simultaneously creates follow up appointments for the email.

Customer Activity Query

- Quickly view all activity related to a customer. View historical trends, pending transactions, quotes, sales orders, shipments, invoices and credit memos, and receipts with drill down to detailed transactions.



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