



Contact Relations Manager

CRM is not just for the Sales department any more. Everyone should have access to a place where they can make notes, be reminded of promises, be able to keep track of their important business contacts. But the CRM should go farther, helping to create business transactions quickly and efficiently without having to move somewhere else in their computer. Our CRM is designed to be such a tool – **made for everyone** in the company to work every day with minimum hassle.

CRM is designed to **work seamlessly** with the Open Systems Accounting System, interfacing with many of their existing modules with access from a single screen. CRM does not replace OSAS but gives you, the daily user, access to those modules you use every day so you can get more accomplished every day. The Daily Work, Call Maintenance allows for rapid access to other parts of the program, even allows for creating a Sales Order or Quote in OSAS. If the optional Quantity Quote system is used, you can even generate a Purchase Requisition and manufacturing Work Order all with a single key stroke.

Call Maintenance

Commands Edit Modes Other Scroll Commands Information Help

OK Abandon

Contact ID: ACE001 ACE BUILDERS Callback Date: 08/14/2007

1588 SE 31ST STREET

PADUCAH KY
28655-7865 US

Phone: (505)555-1646
Fax: (502)555-1566

Email: earlh@3rds.com
Web Site:

Contact 1: John Jones (612)456-9001
Contact 2: Charles (612)456-9002
Contact 3: Mable Snark Secretary (612)333-9876

Call Date	User	Contact Person	Comment	Entry (000009 of 000009)
08/02/2007		MULTI	This is going to allow us to see	
08/02/2007	EWH	Seymour	See how this goes to GoWild	
08/02/2007	EWH	Donald	Testing to see if the email	
07/31/2007	EWH	Joe Smith	Test to see how the email system	
10/01/2000			Sent out sales flier.	

Edit Person New ID First Last Next Previous View Desc Sort By Date

Enter=Edit Comment Add Comment Edit Contact Response Form Order Entry Quote

Company H 08/07/2007 Terminal T000 OVR



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Most work done outside of the company is usually on the phone and this is where the CRM advantage truly shines. The main screen reflects the important contact information, including three most frequently called persons in the contact company. Although you can access 999 contacts for each company, the screen will reflect any three you want, selected either by frequency of call or in the order you select.

We already have a Customer Phone Directory?

The CRM directory is just a side benefit of our process. The true power lies in being able to **replace all those notes** kept in the spiral notebooks on your desk to remind you of the phone conversations, providing enough information to keep you informed instantly.

The screenshot displays the 'Call Maintenance' application window. A modal dialog box titled 'Enter Comments' is open, allowing a user to add a note to a contact record. The dialog includes a menu bar (Commands, Edit, Modes, Other, Information, Help), a toolbar with various icons, and a text area containing the following note: 'We have yet to receive the paperwork that is necessary to fulfill your order that you placed today. Could you either email or fax it to me right away'. Below the text area are fields for 'Date' (08/02/2007), 'By' (EWH), 'Contact' (Mable Shark), and an 'E-Mail?' checkbox. At the bottom of the dialog, there are fields for 'Call Date' (08/16/2007), 'Project ID', 'Time' (.0000), and 'Value' (.00). The background window shows a contact record for 'PADUCAH' with phone and fax numbers, and a status bar at the bottom of the application window displaying 'Company H', '08/07/2007', 'Terminal T000', and 'OVR'.

Comment Screen

One key opens the Comment screen and allows a short note pad to jot down the main facts. Furthermore, if you are working with several outside companies or contractors, assigning a Project ID from the included Project Management feature, you have all the notes in a single place. Each comment details the person taking the note, who they talked to, the note itself, a call back date, and the Project ID. If you wish, you can even record the amount of time spent on the call in minutes or hours. **You can even email** this comment to the person noted above by just checking the email box – when you exit, the email goes.



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The final advantage is that this “notebook” is **available to everyone** who has access to CRM. No more scrambling around looking for Bob's notes because he is on vacation when your best customer calls to confirm that last conversation with him.

We now have more information on our Contacts than just name, address, telephone number and email address?

Not a problem. CRM is designed to allow **creating your own categories** for your contacts. Besides the big three stakeholder, customers, vendors and employees, CRM provides for six fields you can define yourself to customize CRM to fit your company.

The screenshot shows a software window titled "Contacts" with a menu bar (Commands, Edit, Modes, Other, Help) and a toolbar. The main area contains a form for a contact record. The ID is "ACE001" and the Name is "ACE BUILDERS". The Customer ID is also "ACE001". The address is "1588 SE 31ST STREET" in "PADUCAH, KY" with zip "28655-7865" and phone "(505)555-1646". The company type is "Wholesale" with 10 employees. The territory is "MIDWEST" and sales volume is "10000000". The contact's email is "earlh@3rds.com" and website is "www.3rds.com". The contact name is "John" and is included in mailings. Dates include entry (07/31/2008), last mailing (blank), last contact (08/07/2007), and call back (08/14/2007). A status bar at the bottom shows "Company H", "08/07/2007", "Terminal T000", and "OVR".

ID	ACE001	Customer ID	ACE001
Name	ACE BUILDERS	Company Type	Wholesale
Address 1	1588 SE 31ST STREET	Employee #	10
Address 2		YR Became CU	12/31/2002
Address 3		Territory	MIDWEST
City	PADUCAH	State	KY
Zip Code	28655-7865	Country	US
Phone	(505)555-1646	Inc Date	/ /
Fax	(502)555-1566	Sales Vol	10000000
E-Mail Address	earlh@3rds.com		
Web Site	www.3rds.com		
Salutation Name	John		
Include in Mailings?	<input checked="" type="checkbox"/>		
Entry Date	07/31/2008	Customer ID	ACE001
Last Mailing Date		Vendor ID	
Last Contact Date	08/07/2007	Employee ID	
Call Back Date	08/14/2007		

Company H 08/07/2007 Terminal T000 OVR

Company Contact Screen



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Person Contact Screen

It also has an additional six field for the contact person for a total of twelve added classifications. All this information is available from the Comment screen with a single keystroke.

What if I want to email my Comments to more than one person? Do I have to enter the comment in many times?

CRM realizes that there may be **several people collaborating on a project** so it has the capability to create groups. If this is not just a single comment, you can use the direct email screen and invoke the group function.



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Group Email Screen

This function will also write the comment into the appropriate Contact file for a permanent record. You can also attach documents with this email.

Does this mean that CRM is going to replace our email?

Definitely not. CRM uses your existing email system to send messages quickly and efficiently. However, it is designed to be a record of important facts and communications from you to your business associates. It is NOT intended to keep everything said or sent back and forth. This is not a data collector but a repository for **important information**.

We currently use a tool in our sales department for prospecting and keeping contact with our customers. Is CRM intended to replace that system? What else will CRM do?

Not necessarily. Many sales department have extensive data needs and track leads, prospects and general information about the sales process. Those systems are designed specifically for sales people. CRM can be used for this function by using the user defined fields, projects, and email capability. If the sales force is internal and needs to track prospects, generate mailing labels, track advertising campaigns and send information to prospects and customers, CRM can be used in that fashion. Beyond that, your sales people will also have access to all the notes and comments that your other people memorialize in the system through their comments.

How do I get started?



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To run CRM, the Open Systems Accounting Software Accounts Receivable module is required. (if creating sales orders from CRM is desired, OSAS Sales Order is also required). Once Accounts Receivable is set up, you **install** CRM, **update** the Contacts **from** the **Accounts Receivable** master file (a function of CRM that takes about 15 seconds) and **start** documenting calls in CRM. If you have a prospect list in an outside database, CRM has a user defined **import routine** included in File Maintenance. If additional imports are required, CRM is fully Open Data Base Compliant (ODBC/JDBC).

Specifications:

1. CRM requires Open Systems Accounting Software Resource Manager and Accounts Receivable.
2. OSAS Sales Order is required to create Sales Orders from the Comments Screen.

Please call your Open Systems authorized reseller or 763-502-0400 for further information.



ADDITIONAL 3RD DIMENSION SYSTEMS, INC. PRODUCTS

Manufacturing Production Management Suite – full MRPII suite

1. **Bills of Manufacturing** – module to create and manage Bills including assemblies, sub assemblies, materials, work centers, external process and by products. Multi-level bills costed in FIFO, LIFO, AVERAGE and Standard cost. Allows for work order back flush at standard usage, full General Ledger and Inventory accountability and Standard Cost maintenance. Engineering Change Orders tracking included. Requires Opens Systems Accounting Inventory module.
2. **Work Order Processing** – module to create and manage shop floor work flow, integrating with MPM: Bill of Manufacturing (required) for creating all paper flow through the shop floor. Allows for actual material, labor and overhead application to specific jobs. Full accounting interface to OSAS General Ledger, tracking each shop floor transaction automatically. Variance reporting on material, labor and overhead variances. Allows for nine different methods of overhead capture. Further integrates with OSAS Sales Order for tracking work orders to sales orders, Payroll for time capture from the shop floor and CRM for integration with Project Management.
3. **Forecast/MRP** – module to perform “what ifs” based upon either projected sales or purchase by sku. MRP interfaces with OSAS Sales Order, Purchase Order , Inventory and MPM Work Order Processing (required) to provide plant and purchasing management and personnel all needs and availability for products either manufactured or purchased. Forecasts can be combined with actual for companies that build to master schedules. Shortages can automatically generate work orders to the shop floor for manufactured assemblies or generate purchase requisitions for purchased materials.
4. **Shop Floor Control** – module to manage personnel on the shop floor, calculating the manpower requirements based on work orders created in the Work Order Processing module. Fully functional software time clock that integrates with OSAS Payroll. Time clock is functional for both hourly and salaried personnel. Bar coding capability is included.

Inventory Requirements Planning – module to perform “what ifs” based upon either projected sales or purchase by SKU. IRP interfaces with OSAS Sales Order, Purchase Order and Inventory to provide purchasing management and personnel all needs and availability for products either sold and purchased. Forecasts can be combined with actual transactions.



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Shortages can automatically generate purchase requisitions for in OSAS Purchase Order.