

# CRM & EVENT MANAGEMENT

An inexpensive customer data management system packaged together with an event enquiry process. The IndiCater CRM will help you keep comprehensive records of prospects and customers including all the contacts made with them.

Data can be imported from an existing software system such as Excel and there is no limit to the number of records stored. IndiCater CRM includes:

- Easy to use contacts database to manage customer and prospects data
- Multiple data capture fields
- Comprehensive search tool
- Report Wizard with multiple selection criteria
- Separate function/event enquiry process and current status summary
- Tool to set up multiple group types
- Log of calls, letters, emails and other contacts points
- Facility to tag customers and sales prospects to invite to events
- Facility to attach files (letters/mailers etc) to specific contacts
- Data can be imported or exported from existing databases



Resolve the challenges of multiple records keeping and updating with this web based system. All customer and sales prospects are stored in one place and can be accessed and updated by multiple users from anywhere 24/7.

This is a scalable system, used with equal ease by single sites and multiple location operators. All users enjoy the same benefits and there is the option to tailor the systems features and processes to wrap around the way that you work.

IndiCater CRM is licensed on a monthly basis and can be linked to other IndiCater modules and applications at any time.

## Key Functions

### OVERVIEW

This module can be used as a traditional CRM to store and manage contact activity with clients and prospects, or additionally as an event enquiry process. For clients with multiple divisions or subsidiary companies, the CRM can be set up as a single common database, or as separate databases per division or subsidiary.

### COMPANY RECORDS

40+ data recording fields including sector; business type; region; rating; agreement expiry date; prospect status; employees; turnover; parent company tagging with summary view; tagging to link to credit sales client database in IndiCater Finance; sales person ownership tagging; archived owner alert; and current competitor tagging.

### DOCUMENT LIBRARY

The module has the ability to store documents including quotes, letters and agreements. All can be uploaded either to a document library or a specific contact within a company.

### PROMOTIONAL TAGS

Identify and track invites to promotional events and record details of who subsequently attended.

### CONTACT ACTIVITY

Log records of phone calls, emails and other communications including any marketing collateral sent to clients, customers or prospects.

### ENQUIRY PROCESS

This process (Optional) allows each event enquiry to be recorded and updated in under 40+ data capture fields including numbers; internal venue; external venue; menus; beverages; additional services; date quote sent; quote follow ups; reason for release or decline; referrals etc. The enquiry process includes a site visit and analysis tool, supported by a record of all contact and communications made. The enquiry summary report can further provide analysis of sales executive activity.

### EVENT QUOTES

A tailored process (optional) can create templates to produce complete event proposals for each prospect.

### CALENDARS

Multiple calendars can be created to manage the booking of rooms at different locations.

### ENQUIRY PROCESS

Multiple customer and staff surveys can be created with real time graphical analysis of results. An e-voucher follow up / facility is available.