



SmartSolution is the CRM module which manages the database of the SmartPlanner platform in order to optimize all pre-sale, sale, post-sale processes and the processing of the business process analysis. SmartSolution effectively manages procedures and information in order to quickly and efficiently meet your customers' requirements also integrating with the other modules of the platform.

Master

SmartSolution - gestione Cliente - [0000000931] - 3C INFORMATICA SRL 358

Generale Banca Fatturazione Altro Indirizzi-Contatti

Codice Cliente: 0000000931 Cluster: Italia

Cliente: 3C INFORMATICA SRL 358 HeadQuarterID: 3C INFORMATICA SRL\_sas [0000000931]

Indirizzo email: Sito web:

Codice Fiscale: Partita IVA:

Tipologia: CORPORATE Dipartimento:

Stato: Active Lingua: Italiano

Agente: EAL "EAL SYSTEM" Agente 2: RAFFAELLA SYSTEMS

Valuta: Euro NationalPrefixId: 0029

Note:

Ticket types

SMART SOLUTION

Update	Delete	Colore	Descrizione
		#000000	Scansuauto
		#000000	SOLLECITO 1
		#FF9900	SOLLECITO 2
		#33CC33	PREAVVISO DI SOSPENSIONE
		#000000	DISTACCO
		#808080	PRELEGALE
		#EE0000	LEGALE1

Attività: modifica record  
Status ID: 554966

## ADVANTAGES

SmartSolution manages the master data of:

- . Customers.
- . Customer contacts.
- . Products and services  
(it is also possible to manage fee-based services).
- . Prospects.
- . Agents.
- . Product and service lists.
- . **Users** (telephone, mail, social network, mobile).
- . **Activities (Activity System)** - management of production steps and customer support processes, even as work groups' coordination tool.
- . **Ticketing** - management of the issues and problems related to the Services provided: technical failures, inefficiencies, billing errors.
- . **Ancillary data** (banks, tax codes, etc.).
- . Technical data sheets of customers.
- . Management of pop-ups related to "critical" Activities or Tickets.
- . Operators (system users).

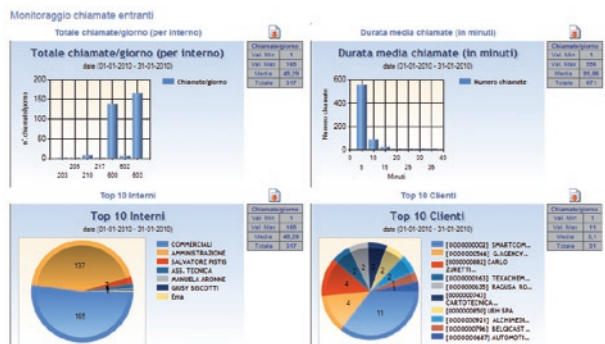
The potential of the CRM SmartSolution proportionally increases with the integration with the other SmartPlanner modules.



SmartGate is the communication channel between the company and the rest of the world. It is a smart switchboard with Business Intelligence functions for the handling and management of telephone traffic.

The system enables the automatic identification of different types of incoming phone calls (customers, suppliers, prospects, etc.) and the processing of different reporting levels targeted to the control of telephone traffic, e.g. supporting Customer Care activities.

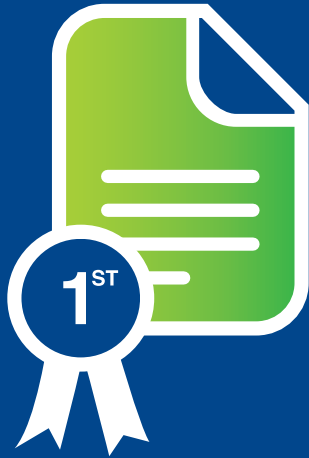
## General statistics



## ADVANTAGES

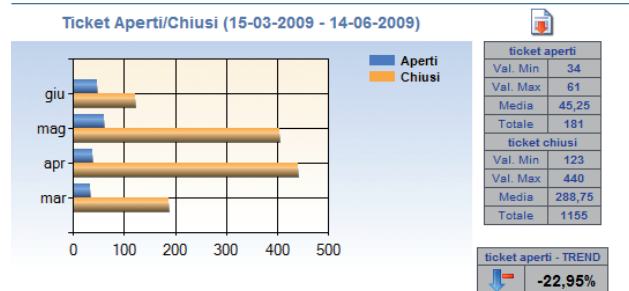
- **Monitoring and control of the whole voice telephone traffic.**
- **Identification of incoming telephone calls** through a pop-up on the screen (customers, suppliers, etc.) with the possibility to directly transfer a call to an internal telephone number.
- **Capability to implement a web farm** (remote switchboard) through data networks or directly in the customer company.
- Capability to have an unlimited range of internal telephone numbers.
- Capability to hold a Call Conference with an unlimited number of contacts.
- Quick restoration of the device through the possibility to clone it on mass storage media.
- **Capability to access the phone call report through the Web.**
- Capability to customize the SmartGate configuration and functions according to the customer requirements.
- **Capability to implement the telework** by assigning an internal telephone number of the switchboard to the operator working at home and by charging the company with the expenses incurred.
- Capability to manage work loads according to the skills and to the number of incoming and outgoing calls.
- **Make free telephone calls** between mobile networks and the internal company telephone network.
- **Capability to interconnect multiple SmartGates anywhere in the world** and to have an administration control over all devices from a single center.
- Maximum security ensured blocking any attempts of unauthorized access to the telephone system.
- **Substantial economic advantage** also resulting from the remote support management.

The potential of SmartGate proportionally increases with the integration with the other modules.



SmartQuality is the system for the quality management. It enables the monitoring of the service and product supply times guaranteed to the customer (Service Level Agreement). It enables to carry out the activities required to comply with the relevant certifications (EN ISO 9001 or similar) and to maintain them. It is the best-of-breed application for Service Providers which must continuously manage and control the quality of services and products delivered to their customers through a strategically defined and coded Quality System.

Drill-Down



The potential of SmartQuality proportionally increases with the integration with the other SmartPlanner modules.

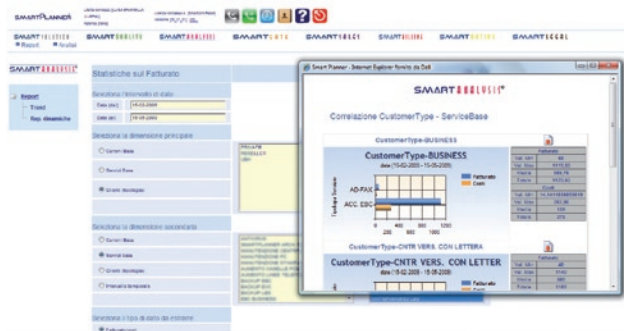
## ADVANTAGES

- . **Total management of customer ticket/request flows:**
  - entry of process types relevant to services (e.g.: assistance, installation and testing of the service, finalization of the contract, etc.) with many options and the greatest flexibility
  - entry of the actions carried out in the different ticket management phases (e.g.: service interruption, technical assistance at the customer premises, etc.)
  - capability to define a maximum response time for every customer ticket/request (repaired fault, restored service, etc.) in order to manage and monitor efficiency and quality against the commitment assured in terms of Quality System
  - real-time detailed reports aimed at controlling the customer relationship performance
- . **Quality control of the production** and check of the scraps.
- . **Check of production data** and comparison with expectations and pre-defined quality levels.
- . **Two reporting types:**
  - **trend:** general situation on a monthly basis concerning open/closed Tickets, Tickets compliant/not compliant with SLA parameters, performances of individual operators, production analysis and report against pre-defined parameters
  - **dynamic reports:** analysis of the different ticket management phases: tracing of the fault/problem, history of the process leading to the problem solution and of customer/operator interactions, relationship among customers, services, ticket types and operators
- . **The system enables the analysis of SLA parameters** from different perspectives.
- . Minimization of times, costs and any errors in the post-sale service as for tickets and requests.
- . **Achievement of 99.9% in terms of Service Level Agreements (SLA).**
- . Optimization of in-house resources.

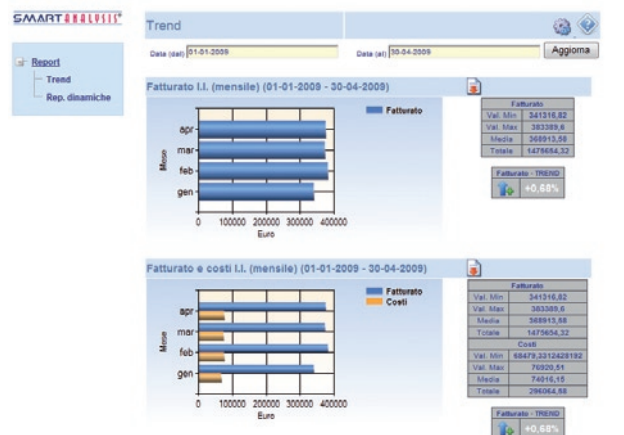


SmartAnalysis is the module which transforms the business data into strategic information in order to support decision-making activities. It enables managers to autonomously execute complex reports in real-time and without requiring the assistance of specialized resources.

## Dynamic reports



## Trend



## ADVANTAGES

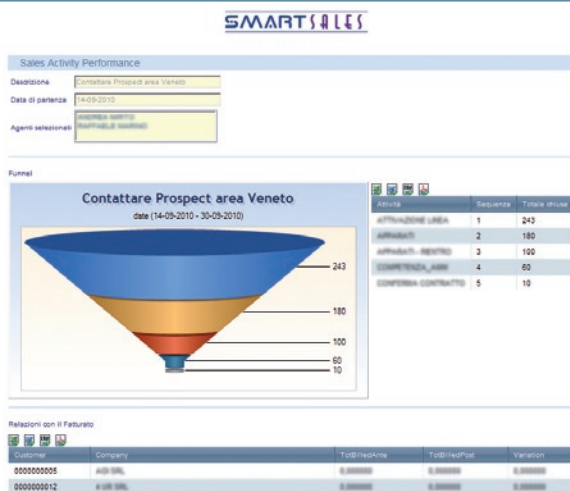
- **Real-time analysis of KPI** (Key Performance Indicator).
- Check of consistency or forecast-budget variance.
- **Trend analysis:** Set of automatic reports for the real-time display of:
  - turnover (on a monthly basis)
  - turnover/cost ratio for marginality assessment
  - total amount of services Activated/Deactivated in the period
  - total amount of fees Activated/Deactivated in the period
- **Dynamic reports** able to combine different data, fees, services and customers types in order to analyze the turnover/cost ratio and to identify higher/lower profitability sectors.
- **OLAP reports** aimed at analyzing the evolution of customer-, service-, and fee-related data recorded at different time intervals (on a monthly basis). Drill-down function for a detailed analysis of the relevant figures and values.
- **Strategic planning** aimed at improving business performance.

The potential of SmartAnalysis proportionally increases with the integration with the other SmartPlanner modules.

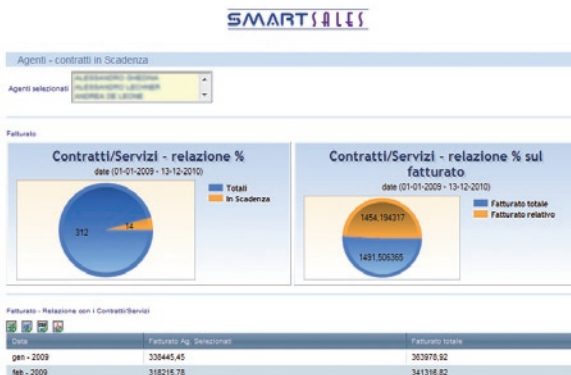


SmartSales is an ad-hoc module which has been designed to support all operating and business requirements of the sales network and to monitor the agents' performance.

## Funnel



## Portfolio



## ADVANTAGES

- **Automatic configuration of even complex sales quotations;** it allows agents to autonomously manage any printout. **The procedure requires few clicks:** the agent uses an online configurator for the creation of the quotation which is **generated and produced in PDF format** and can be printed and shared with the Customer/Prospect.
- **Automatic archiving and history of quotations** on the server. It enables the archiving and indexing of quotations even in case the agent has left the company.
- **Management of expiring contracts.** For each agent or group of agents, it is possible to extract the list of customers with expiring contracts in order to timely propose the relevant renewal.
- **Funnel Function.** It enables to configure a specific sequence of activities (Funnel) relevant to the different deployment steps of a project/objective (e.g.: different phases of contacts with prospects up to the contract signature and, therefore, to the relevant transformation into customers). The Funnel reference persons can also be different agent teams. **The system records the results of individual activities** and enables to analyze and evaluate success/failure percentages.
- **It enables the monitoring of business activities** by improving sales performance.

The potential of SmartSales proportionally increases with the integration with the other SmartPlanner modules.



SmartRating and SmartBilling are a system made up of two integrated modules which enable to upload and process the consumption data of customers and to manage the comprehensive billing process. The modules are multi-company and enable the management of different time-based billing cycles (monthly, bimonthly, etc.) as well as third-party billing.

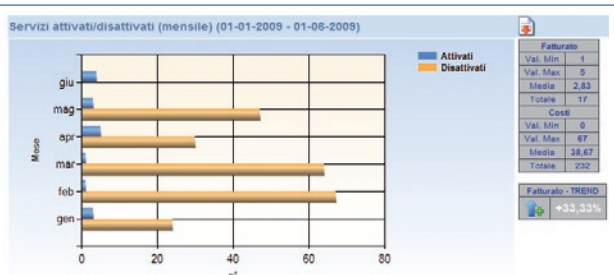
## Customer invoices

Info	num.	Stampa	Totale	Imponibile	IVA	Scatta	Com. da	Com. a	Scadenza
	0000002022	31/05/2009	€ 1.246,12	€ 1.027,50	€ 207,52	€ 0,00	01/05/2009	01/05/2009	30/05/2009
	0000001518	30/04/2009	€ 947,35	€ 789,45	€ 157,89	€ 0,00	01/04/2009	01/05/2009	31/05/2009
	0000001014	31/03/2009	€ 1.322,22	€ 1.100,93	€ 221,37	€ 0,00	01/03/2009	01/04/2009	30/04/2009
	0000000414	28/02/2009	€ 801,68	€ 781,32	€ 180,28	€ 0,00	01/02/2009	01/03/2009	31/03/2009
	0000000143	31/01/2009	€ 1.286,69	€ 1.082,41	€ 210,48	€ 0,00	01/01/2009	01/02/2009	28/02/2009

Descr.	Imponibile	IVA%	IVA	Totale	Com. da	Com. a
1.00	€ 40,00	20,00000	CM-93TEL	F	01/05/2009	30/05/2009
1.00	€ 90,00	20,00000	CM-90ACCESSORI	F	01/05/2009	30/05/2009
1.00	€ 78,00	20,00000	CM-SITO10	F	01/05/2009	30/05/2009
1.00	€ 720,00	20,00000	CM-93C-MEDIUM	F	01/05/2009	30/05/2009
1.00	€ 10,00	20,00000	SPES6-SPED	F	24/02/2009	24/02/2009

## Service-fee relations



## ADVANTAGES

- . Automatic entry of customer consumption data.
- . Consumption data entry in the bill.
- . **Generation of PDF documents and relevant shipment via e-mail** leading to considerable cost savings (envelops, sheets, toner, assembly, postal expenses).
- . Customers enabled to display and download the bill and the relevant consumption details through the Web.
- . **Automatic link of bills to the CRM SmartSolution module** which is also used by the Customer Care service for checking out details, e.g. in case of customer complaints.
- . **Management of multiple independent companies.**
- . **Third-party billing.**
- . **Management of different time-based billing cycles** (monthly, bimonthly, etc.).
- . Considerable paper and space savings in connection with the archiving of physical documents.
- . **Dramatic reduction of the time** required to locate and access the documents which can now be indexed.
- . **Automatic and immediate availability of data** which can be used to carry out Business Intelligence analyses in synergy with the SmartAnalysis module.

The potential of SmartRating and SmartBilling proportionally increases with the integration of the other SmartPlanner modules.



**SmartSecurity is the module which manages processes and requirements related to the company safety and security - insurance, fire prevention and accident prevention measures - also in connection with the Law obligations (former Law 626, now 81).**

## Activities

## ADVANTAGES

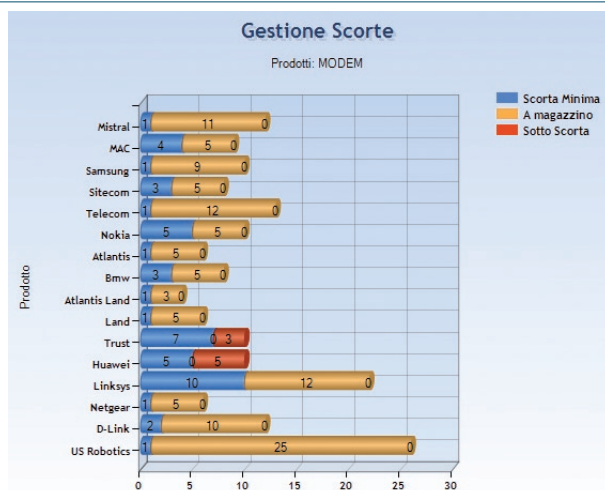
- **Master data of internal or external personnel responsible** for various security-related activities (fire prevention, work safety, etc.) including substitutes in case of absence of the relevant person.
- **Document archiving and indexing** with notification and display of deadlines and obligations required in order to comply with security and safety standards.
- **Master data of all employees** with details on security-related activities carried out by each employee (e.g. trainings, periodic medical examinations, etc.).
- **List of due dates and deadlines:** medical examinations, training courses, inspection and test of fire extinguishers and lifts, etc. On the specific due date, a pop-up is displayed to the person responsible for completing the relevant activity.
- **History file** provided to the relevant employee or to the Security/Safety Manager.
- The integration with CRM SmartSolution, with SmartAnalysys and SmartQuality enables **the cross-matching and indexing of all data.**
- **Control and inspection of the internal pharmacy**, notifying the expiry date of medicines and sending out requests for substitute products or supplies.

The potential of SmartSecurity proportionally increases with the integration with the other SmartPlanner modules.



SmartInventory is the warehouse management module; thanks to its ability to interact with the other SmartPlanner modules, it provides an end-to-end and integrated management of all relevant processes (suppliers, customers, administration, Customer Care).

Stock management



## ADVANTAGES

- . Detailed material master.
- . Classification by category.
- . **Capability to link a supplier to each material** with the relevant purchase price.
- . Clear and immediate display of the stock availability.
- . **Management of minimum stock level.**
- . Immediate display of out-of-stock goods and products to be reordered.
- . **Online material booking.**
- . Remote warehouse display.
- . Interface with Logistics.
- . Display of inbound and outbound goods.
- . **Product traceability.**

The potential of SmartInventory proportionally increases with the integration with the other SmartPlanner modules.



**SmartLegal is the module for the management of legal activities and credit recovery.**

Ticket

The screenshot displays the SmartLegal Ticket management interface. On the left, there is a list of tickets with columns for ID, Numero, Tipologia, and various status indicators. The main area shows a detailed view of a selected ticket, titled 'Ticket - modifica record'. This view includes fields for ID (93984), Numero (93984), Tipologia (Recupero credito), Cliente (AGIL FAMILY (SAP-AGILFAM)), and various status and action buttons. The interface also shows a 'Checklist TT' and 'Phase in servizio' section with a date and time stamp of 27-09-2010 12:59:03. There are also buttons for 'Stampa', 'Allega', and 'Stagia'.

## ADVANTAGES

- . Management of files and records with capabilities to manage customer masters and history files of individual steps.
- . **Personal organizer with deadlines for every single case.**
- . **End-to-end integration with SmartSolution:**
  - sharing of master data related to reference agents, sharing of activity sequences targeted to the coordination with lawyers and Customer Care.
- . Enables specific analyses and advanced reporting for each individual case.
- . **Capability to link external files** (.doc, .xls, .pdf, .html) to any case in order to enable indexing and to provide the highest visibility during the case management.
- . **Multi-format report** (.doc, .xls, .pdf, .html) which can be exported to files, via fax, via e-mail, etc.
- . **Integration with Microsoft Office and Microsoft Exchange** for the management of the address book and of appointments.
- . Capability to simultaneously manage multiple legal departments or law firms with multiple locations.

The potential of SmartLegal proportionally increases with the integration with the other SmartPlanner modules.