1. Introduction to iCube CRM Lite™

iCube CRM Lite™ is a simple customer relationship management system complementing Sage CRM to target for small to medium businesses that need

- a web-based solution with simple processing

- core functionalities for
  - account and contact management
  - tracking communication, notes and documents
  - tracking leads, sales opportunities and the required tasks
  - entering sales quotation and sales orders
  - measuring sales performance and analysis
  - performing customer service

- account control for sales people to access their own accounts

- integration with Sage ERP to
  - view item and inventory information
  - view customer statistics, credit and order status, history of quotes, orders invoices and payment
  - auto post accounting transactions
  - auto promote accounts to customers

- integration with iCube products to
  - enter RMA orders and view status
  - view product BOMs, ECOs, engineering released documents
  - view status of the related purchase orders/manufacturing orders

ERP does not manage all customer relationship. It processes customers' orders and the related accounting transactions. The majority of relationship management from gathering suspects, the interactions with accounts to closing orders and servicing are missed in ERP which are addressed by CRM. In order to provide a simple user interface to manage customer relationship, CRM needs to integrate with ERP to handle the order and accounting processing within CRM.

iCube CRM Lite is an independent system running outside of and integrating to Sage ERPs through Sage SDK. It retrieves from ERP the information of customers, products and inventory; and posting the updated customer information, the sales and service transactions back to ERP. Users involving with customers can solely using iCube CRM Lite without accessing to ERP anymore.

iCube CRM is designed to be "Simple", ease-of-use with focused core functions to manage customer relationship and intelligence for on-going improvement.

2. Manage customer relationship

“Customer” in CRM is a general term and a superset of “customers” that also includes “prospects” that you have business deals working on and “suspects” that had not been connected. “Customer” can be a person or a company. In iCube CRM Lite, we refer a customer by account. Many users also use CRM for vendors or business partners.

Knowing who they are

Relationship building starts from identifying who you want to build relationship with. iCube CRM Lite provides various parameters to classify the accounts, from their business models to their industries and the source of knowing them etc. This will help you to identify and prioritize them to build the relationship.

Building relationship

Customer relationship is built upon the interactions you have had with them. The interactions accumulate data and experience that turn to important information, knowledge and cohesiveness. This will allow you to have closer relationship with them and have better chance to succeed for any business opportunities. Storing and tracking of this information is a key requirement of CRM.

The information is the result generated from customers’ interactions. The features to support and facilitates interactions are another key requirements of CRM such as how to be effectively and efficiently to track the communication and activities (selling, servicing, chatting…); with whom, time and status, and the associated documents (sales orders, quotations, service tickets) etc.

Enhancing relationship

Relationship building itself is an on-going process. You need to continue to interact with the accounts to develop, reinforce and enhance the relationship.

CRM gives you the insights of how well you are doing and what need to improve. It presents the progress and status of the activities; the tasks, issues, schedule, progress and the task owner; and anything that are off from requirements.

Knowing what to improve, CRM allows you to manage and monitor the interaction to make sure the interactions are under control.

Secure relationship control

Information and processing of account activities are crucial, sensitive and need to be control. iCube CRM Lite controls accounts only to be accessible to the responsible sales person. Management reports are also available to authorized users

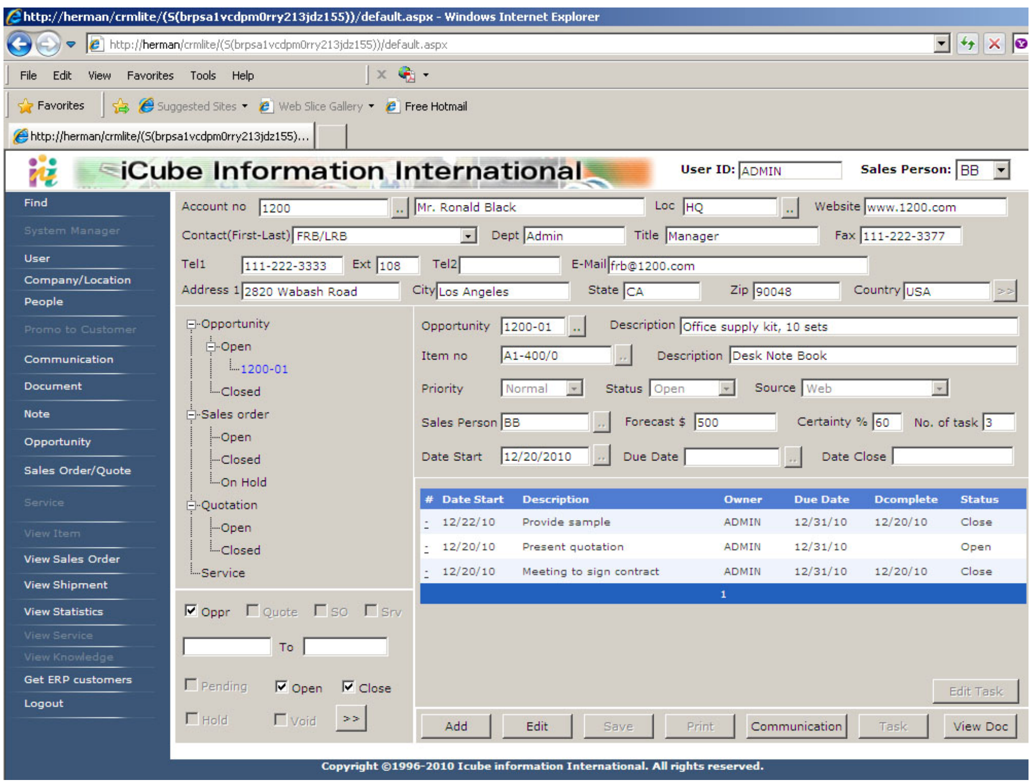
©iCube Information Int’l 2011 All rights reversed www.icubeinfo.com

3. Ease-of-use

A key emphasis of iCube CRM Lite is for users' experience to help them doing the job better, faster and easier. It is accomplished with the unique user interface that presents intelligent data for the core functions with streamlined process.

It collects the real-time and useful information for the account, present them in multiple levels, at the right place to give you the system can help them, how easy and how fast. The principles are present right information at the right time, simple to operate and powerful features.

User-friendly design



Header

This section allows you to select a contact (any person from any account at any location). All information and activities will be for this contact until you switch until you select another one.

Menu

This section displays all the functions this user is authorized to operate.
Clicking on a link launches the corresponding function for the selected account specified in the header section.

Treeview

This section breaks down orders by types (quotes, sales orders, sales opportunities and Services) further by status (pending, open, closed, void and on-hold).

What order type and what status to display is user preference. Each user can select its preference and once it is set, treeview will default to the order type and status to display. You can add/edit/remove any selection anytime.

Once an order is clicked, the details of the order will be displayed in the detail section.

Function

This section is an overlay for all the functions and command defined in the menu. Clicking a function in link will overlay the function screen on this section. This feature allows you to process functions in CRM without switching from one screen to another.

Intelligent information

The intelligence is to present at the right place at the right time for the right information to ease your work and to minimize the disruption and the extra time and efforts for gathering the missing data.

iCube CRM Lite starts by giving you an overview of your selected account. The header identifies the contact. The treeview shows all the outstanding activities (sales orders, opportunities, customer service and quotes) that are still in process.

You can click on an order in the treeview to see the details, or a link in the menu to view the real-time information from ERP and CRM; about the customer status and statistics; order for sales orders, quotes, sales opportunities; communication and notes and status for services and RMAs etc.

Simple process

Launching a function to process certain activities is simply to click on the corresponding link in the menu. You can enter sales orders, quotation and processing customer services; and viewing the related transactions and data within CRM without logging to the ERP to process.

©iCube Information Int'l 2011 All rights reversed www.icubeinfo.com

4. Core functionality

Manage contact

This function allows you to classify the accounts for easier planning, prioritizing and focusing on the relationship development. Each account can consist of multiple locations represented by the ship-to address in ERP, with multiple people per location.

You can track the following information that may be tied to a sales opportunity or for a contact person or the entire company as a whole.

a. communication (by mail, email, phone or any user definable media),
b. activities (demo, presentation, customer visit, meetings…) with
c. supportive notes and documents (text, PDF, Image, Video and Audio)

This information gives you better understanding about the account to ease the development.

Manage sales opportunity

A sales opportunity is a potential order that needs to be well managed to maximize its success. It ties to one or more products, with an expected closing date, the sales amount and your estimation of success closing rate.

Each opportunity may have different requirements which may depend on specific tasks such as product presentation, customer evaluation, submit proposal and, contract negotiation. You may each task with deadline and owner and the expected completion date. Along the progress of this opportunity, you need to update the status and progress for each task, and the opportunity itself.

If the opportunity is successful, the related quote will be converted to sales order in ERP. If this account is new, the account information will be auto created to ERP as a new customer (refer to “Promo accounts to ERP customers for detail).

Promo accounts to ERP customers

Every sales order requires the associated customer record to be existed in ERP. This feature is to automatically create a customer record in ERP with the information from the account to save the entry.

Create sales orders/quotes

Enter/edit sales orders or quotes are part of the order processing system of ERP. iCube CRM Lite provides an order entry interface that you can create them within CRM.
This function also lists sales orders by your selected status in the treeview such that you have the overview of all order status for this customer while you are working on the order.

You may click on a sales order that will pop up a screen to display the content while you are working on the current one.

If iCube eSO is installed, the sales order will be at pending status and is posted to eSO for sales approval before posting to ERP.

View customers' info

This function displays the current customer status and statistics which consist of the payment term, credit balance, the year to date order amount, invoice amount and payment amount. All this information can be drilled down to the transaction level.

View item and inventory

This function displays the item list and the inventory status broken down by location.

Service customers

This function allows you to create service orders to track them from start to resolution. You can classify the service type, define the issues, and enter the details, notes, reasons and status.

Like sales orders, the treeview shows the service orders by status to give you the overview of services and detail of specific order for this account.

Process RMA

This function requires iCube Customer1st to be installed which process and manage customer returns from issuing and approving RMA orders, receiving them, process credit, replacement or repair or return to vendor, to returning the serviced products back to customers that also posting all related accounting transactions.

This function allows you to create RMA orders, approving them and forward the control to Customer1st for the back-office processing. If the "Self-service" module is installed, you will see the RMA requests entered by customers on-line, and you can just do approving.

Approved RMAs are processed in Customer1st, you will see the status and progress in this function.

5. Intelligence for ongoing improvement

CRM is more than just a tool to manage customer relationship. It also delivers customer satisfaction and sales performance as a result of good customer relationship management, and insights for on-going improvement.

iCube CRM Lite gives you important information about your account, to ease your plan and activities for relationship development. It tracks the activities and communication of the accounts such that you know the status, progress, issues of sales opportunities and any pending tasks to avoid overlook to maximize the success.

The information can speak for the performance. You know the hit rate of sales opportunities and the prospects that have turned to customers. You know their needs, their feedback and when and what they were asking for help, the resolution and the turnaround time. From other perspective, it also gives you which areas, such as which product lines, which territories and the sales people that have not met expectation or with potential to do even better. The important also gives you insight for on-going improvement.