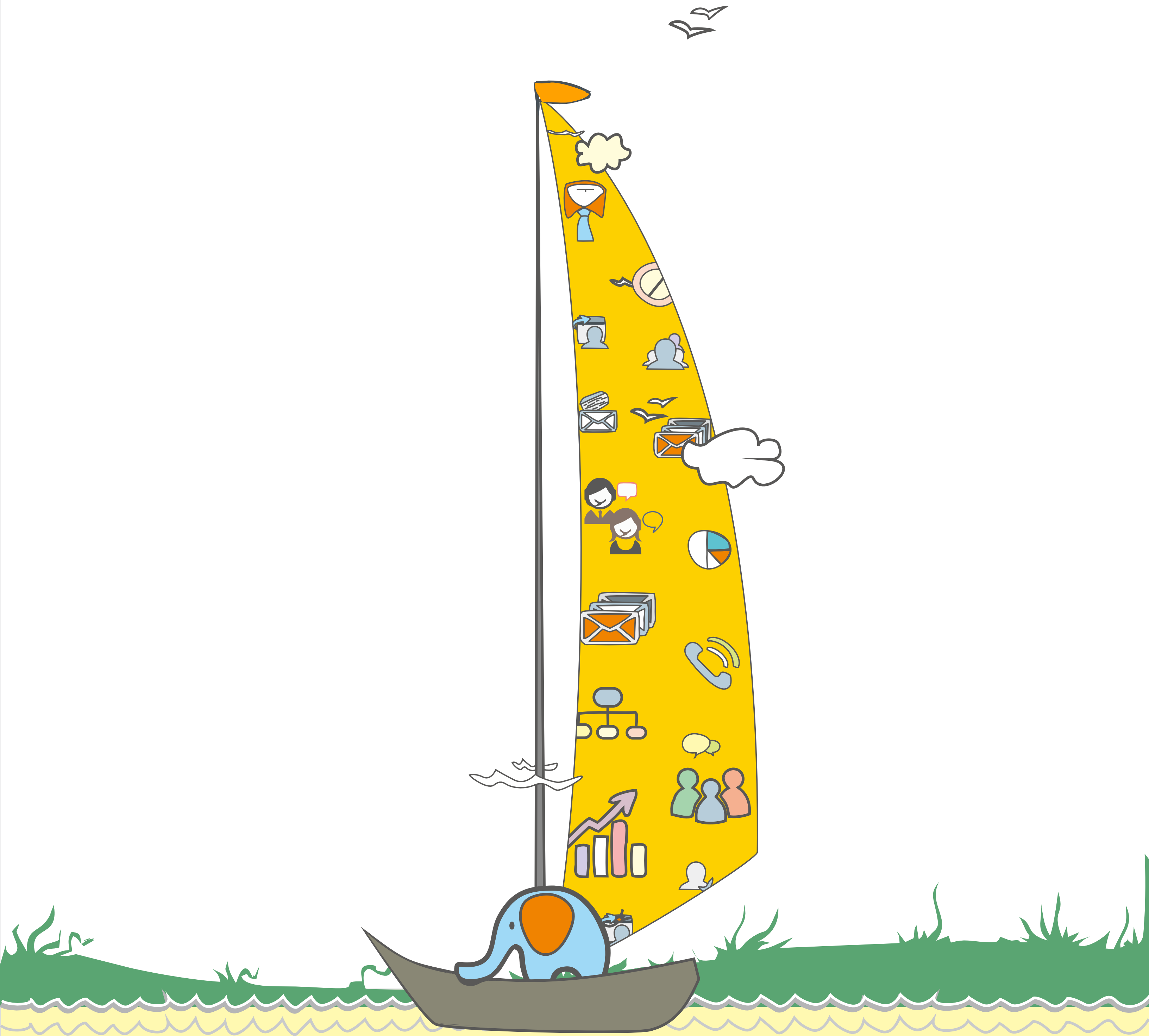
Marketingship



Marketingship CRM Feature List

http://www.marketingship.com

CRM Feature List

Keeping abreast of problems and procedures is vital to a successful enterprise. Customer questions and complaints need to be answered and customer issues addressed. Technical problems have to be clearly communicated and quickly fixed before the affect the bottom line. Potential leads need to be verified and all sales must be comprehensively documented. All these actions need to be performed swiftly and routinely.

That's where Customer Relations Management- or CRM- Solutions come in. More than mere customer relation channels, this service, full integrated with Marketingship's CommunityCraft portal, allows customers to submit their issues, receive responses, and search for answers in linked knowledge pages and media files, and allows you to receive, and respond to customer issues. It also lets you track and update your own internal issues, troubleshoot internal IT problems, conduct lead verifications, manage sales, plot a project, and more. The Marketingship CRM Solution offers a host of features and options for you to create the perfect customer relation experience for both you and your customers.

Marketingship's CRM solution focuses on five basic CRM project types that can be used immediately or customized to exactly fit any relations niche.

Customer Support

Customers often have questions or concerns, and the Customer Support project type is organized to facilitate receiving and answering those questions through the CommunityCraft Portal. The project provides fields for support area, the priority of the aid required, and detailed description of problems, among others, and also allows support team members to respond directly to customer submissions to allow for an ongoing dialogue between customers and support staff.

Issue Tracking

Any endeavor can run into issues, and anyone can come across an issue that requires attention. Issue tracking projects are a generalized template intended for internal and external issue tracking and resolution on a wide variety of projects, from internal defect tracking to assigning internal team tasks, or any other issue that can be conceived to customize a project around.

IT Support

Technical issues can be crippling to anyone who relies on computer for their work. IT support projects are designed around receiving and resolving IT related problems, from connection errors in the latest release of a software to hardware errors on local machines before they cut into productivity.

Lead Qualification

Leads are people who may become assets to your organization. Lead Qualification projects enable the tracking of each potential lead and their position in the qualification process. States are provided to note if a lead needs to be called, has been called, has been confirmed, and if they've been qualified or disqualified as a lead and more states can be added to adjust to differing process procedures.

Sales Management

Keeping track of one's sales and sales opportunities can make or break a business. Sales projects exist to do just that. With fields to note the products and amounts each potential buyer is interested in along the likelihood of their purchase, sales projects allow a sales team to track the sale from the initial pitch to when the sale is made. Sales projects also allow each sale to be tracked after the sale, with states for sent invoiced, completed payment, canceled orders, and completed shipments.

Each project type has its own specialties that can be used and refined for your own CRM project requirements. In addition, there are also many features of the CRM that enrich and enhance the whole of the CRM solution.

Project Creation

- Pre-defined CRM project templates let you jump right into the basics of Customer Relations as soon as you start using the CRM solution.
- One step project creation can use pre-defined templates or any custom created CRM project as the base for a project, or create a blank project for complete project customization.
- Five different project templates exist to let you create a Customer Support, Issue Tracking, IT support, Lead Qualification, or Sales Project, fully ready for use, in seconds.

Project Management

- Each field in any project, custom or default, can be edited to fit specific project needs.
- Custom information fields can be defined to fit any project need.
- Unlimited Fields and Unlimited Projects allow for infinite potential CRM expansion.
- Rename projects and Tickets at any time to better define project purposes.

GUI Customization

- CRM tickets can be customized with any system or custom information field
- Submission and Edit dialogues can be edited to prioritize different information at different workflow states.
- Different information fields can be made visible to Customers and Support Team Members to define and streamline each side's role in Incident resolution.
- Additional Information Pages makes creating an efficient, coherent GUI for support team and customers an intuitive, fluid process.
- At a glance information views can be customized by each support member or customer, and remembered for that user.

- Tickets can be customized to support multiple or singular file attachments, allowing customers and support team members to share files and information for faster incident resolution.

Workflow Customization

- Each CRM project has its own editable ticket states for per project workflow definition.
- Tickets states can be color coded to indicate ticket progress, ticket irregularities, or any other criteria.
- Ticket state restrictions enable strict workflow by defining which alternate states are available for each ticket state.
- Ticket Owners can be defined to make sure only the right support team members have access to incident tickets at a given time.
- Ticket State and Owner definitions combine to allow for complex yet easily created ticket escalation and validation protocols.

Portal Integration

- Each created project can be enabled to appear and interact with the CommunityCraft Portal with a single button click.
- Projects can be made visible to every portal member type, select member types, or even no member types, to ensure customers only see CRM projects relevant to their member types.
- Each Portal Member may see all of their own incident tickets without seeing any incidents of any other member.

Ticket Management

- Each submitted ticket is preserved forever until deleted. There is no limit to the number of tickets that the CRM solution or any given CRM project can have.
- Ticket numbers never repeat, allowing for an accurate count of tickets submitted, closed, resolved, and deleted.
- Tickets can be created and assigned to portal members and contacts in addition to members being able to submit their own tickets.
- Tickets can be assigned to multiple contacts at once to create multiple tickets, especially useful for Lead Support and Sales Projects.

Email Notifications

- Email notifications can be customized to automatically be sent out in response to any predefined event, from ticket creation, to state change, or even change of owners.
- Define who receives what notifications, to ensure the right people get the emails they need to see, and no more. Recipients can be selected from the ticket submitter, the current ticket owner, or any member of the project's team members. Only a single email will be sent to each recipient, even if a single person fits multiple recipient criteria.
- Notifications are enabled, disabled, and defined at a project level, allowing each CRM project to have its own notification scheme.