

Excellent CRM Software

and more than 30 years of experience that's our proposition for SMEs



We make software that provides SMEs with a standard CRM solution that is as highly flexible as it is quickly and readily incorporable into your operations and individually adaptable to your needs as you expand or mature your business.

easy. flexible. powerful.

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Editorial



Anastasios Kotsilas
Director - Sales and Strategy



Alexander Abaew
Director - Projects

For 30 years now we have been driven by three principal entrepreneurial incentives: customer proximity, innovation, and sustainability.

Since the founding of our company back in 1989, our declared mission has always been to develop customer-centered products. It is not surprising, therefore, that more than 47% of all our innovations to the standard solutions we provide continue to be developed on the back of specific customer requirements.

While we do, of course, keep a keen eye on emerging trends, the solutions we offer our customers are nevertheless crafted to effectively meet the actual needs of our customers - the aim being to achieve lasting integrity for their investments and individual invigoration for their businesses in the chosen markets.

An enterprise strategy conceived to be truly sustainable and the continual pursuit of employee satisfaction and pro-partnership customer relations have enabled us to build a solid foundation that gives us and gives you the long-term stability needed to continue to be successful, now and in future.

We invite you to consider our solutions for your business. PiSA sales CRM is a much more extensive proposition than conventional CRM solutions, with functionalities that fully accommodate the demands of marketing, sales, and service operations. Thousands and thousands of professionals around the globe now use our technologies to keep their businesses working efficiently.

We hope this brochure will inspire you. If you would like more information about our system, we will be more than happy to explore and discuss the particular needs of your business with you. Please feel free to get in touch with us.

Who trusts us

An overview of some of our customers

Our CRM solutions are employed by top-name SMEs the world over. As a medium-size enterprise, we are in a position to relate absolutely to what our customers need, and we are as passionate about the CRM projects we roll out at a local level as we about those with multinational dimensions.

Our customers include businesses in the mechanical- and plant-engineering sector, the electronics industry, in the fields of building and facility engineering, chemical industry, B2B commerce, publishing, and in the services sector.
































Highlights

10 good reasons to choose the PiSA sales CRM

1

User-friendly interfaces

Overviews at a glance and quick accessibility

Discover just how intuitive the PiSA sales CRM is to use. You will be surprised at the ease with which user interfaces can be adapted to your way of working. What you get is not any-old CRM, but a personalized CRM solution for your business.

2

All the information you need at your fingertips

On smartphones, tablets, notebooks

The PiSA sales CRM can be enabled on all end devices, with responsive interfaces for easy operation and ideal information presentation.

3

Top technology

Cutting edge and operable on all platforms

We pair our unique base technology with the application of modern industry standards to guarantee the lasting protection of your investment and your independence from fixed hardware and hardware suppliers.

4

Service excellence

Personal, capable, transparent

Whether you opt for around-the-clock self-service availability or a comprehensive package of personal support, our objective is always the same: To make sure you get the help you need ASAP and that you are consistently satisfied.

5

Individualized pricing

Best price-performance value for money

The choice is yours to either enter a leasing agreement or to buy your system outright. PiSA sales CRM is available as a purchased self-hosted solution or as a secured cloud solution. We will also be happy to offer you any of our range of financing models.



100% Made in Germany

Quality, security, dependability

What we provide are evolutionarily matured solutions geared exclusively to the demands of our customers. The quality and sustained integrity of your investment are our “guiding stars.”

Exceptional flexibility and modularity

Better than any made-to-order system

Our CRM systems are designed to be perfectly tailored to the needs of your business and individually adapted to your operating demands while remaining upgradeable at all times.

Standard functions that cover all business essentials

PiSA sales is one of the most powerful systems on the market

Use a CRM solution that will give your business optimized capabilities over many years to come. You can start out with a very simple setup, then gradually build it into a powerhouse system.

Suitability for all fields of commerce

Sector-specific capabilities

The standard-version PiSA sales CRM makes fundamental accommodations for sector-specific processes to save you time and money.

More than 30 years of experience

Our experience is your benefit

Make the most of our seasoned expertise acquired over more than 29 years in the IT business and the accumulated know-how we have drawn from our involvement in projects of all kind.

6

7

8

9

10

Features

The PiSA sales CRM at a glance

The PiSA sales CRM gives you maximum flexibility. Our standard solutions already include a wide selection of functions for your business processes. We can then adapt or expand the functions you choose as required for your particular needs.

What you get, ultimately, is a tailored solution comprising standard components that you can augment with additional functions at any time.



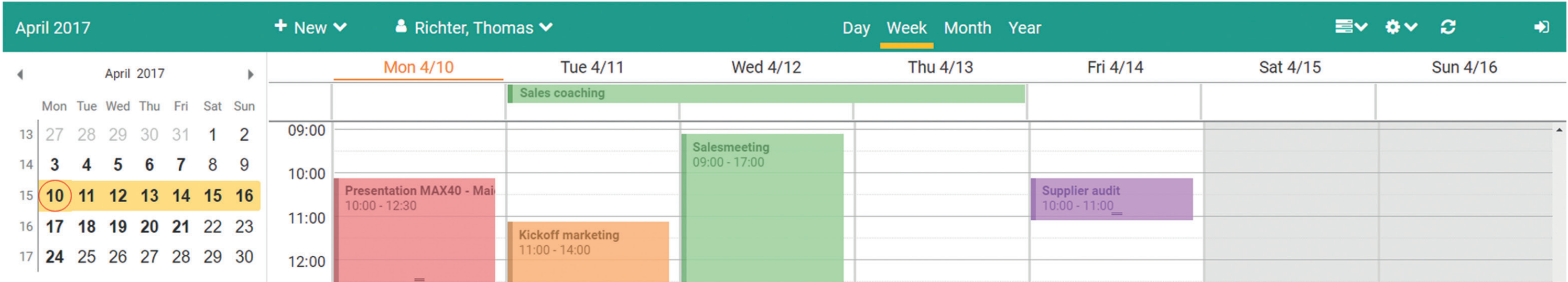
“Our product strategy is centered on achieving customer benefit.”

Anastasios Kotsilas
Director, PiSA sales GmbH



Contacts & Activities

Instant availability of all information



The central contact management function in the PiSA sales CRM allows you to process and manage address data, enterprise structures, and contact relationships for any or all of your business partners (XRM). A company overview lets you map out enterprise structures and easily navigate through all the data relating to the entities within those structures. The system also lets you transparently detail any changes in a company's legal status or its name as well as any employment moves by your contacts.

The PiSA sales CRM will provide information to your marketing operatives on all marketing leads and information to your sales and service staff on all your customers and prospective customers. In addition, the system lets you track and manage any or all of your other business partners, including traders or competitors. It will even help your purchasing department to manage its supplier data and run procurement projects.

Save time and nerves

- ✓ obtain and manage consents for the use of personal data with legal certainty
- ✓ definition of deletion periods, management of data protection issues and data protection incidents
- ✓ sophisticated mechanisms enabling three-tier deletion of personal data
- ✓ centralized, uniform administration of contacts and companies
- ✓ high-performance de-duplication
- ✓ 360°-perspective on all business partners
- ✓ multi-level system of secure access rights
- ✓ calendar synchronization with Outlook Exchange and Lotus Notes
- ✓ email processing straight from CRM
- ✓ professional activities management, incl. business-process management
- ✓ innovative chat collaboration tool
- ✓ ...

The activities management function in PiSA sales CRM will help you to make effective use of individual and team working times. Thanks to a first-rate reminder and follow-up function, none of your to-do's will ever be overlooked. All the activities scheduled and delegated in and executed via your system will become automatically and historically linked to the relevant context data, e.g. to the appropriate customer and case (business opportunity, quote).

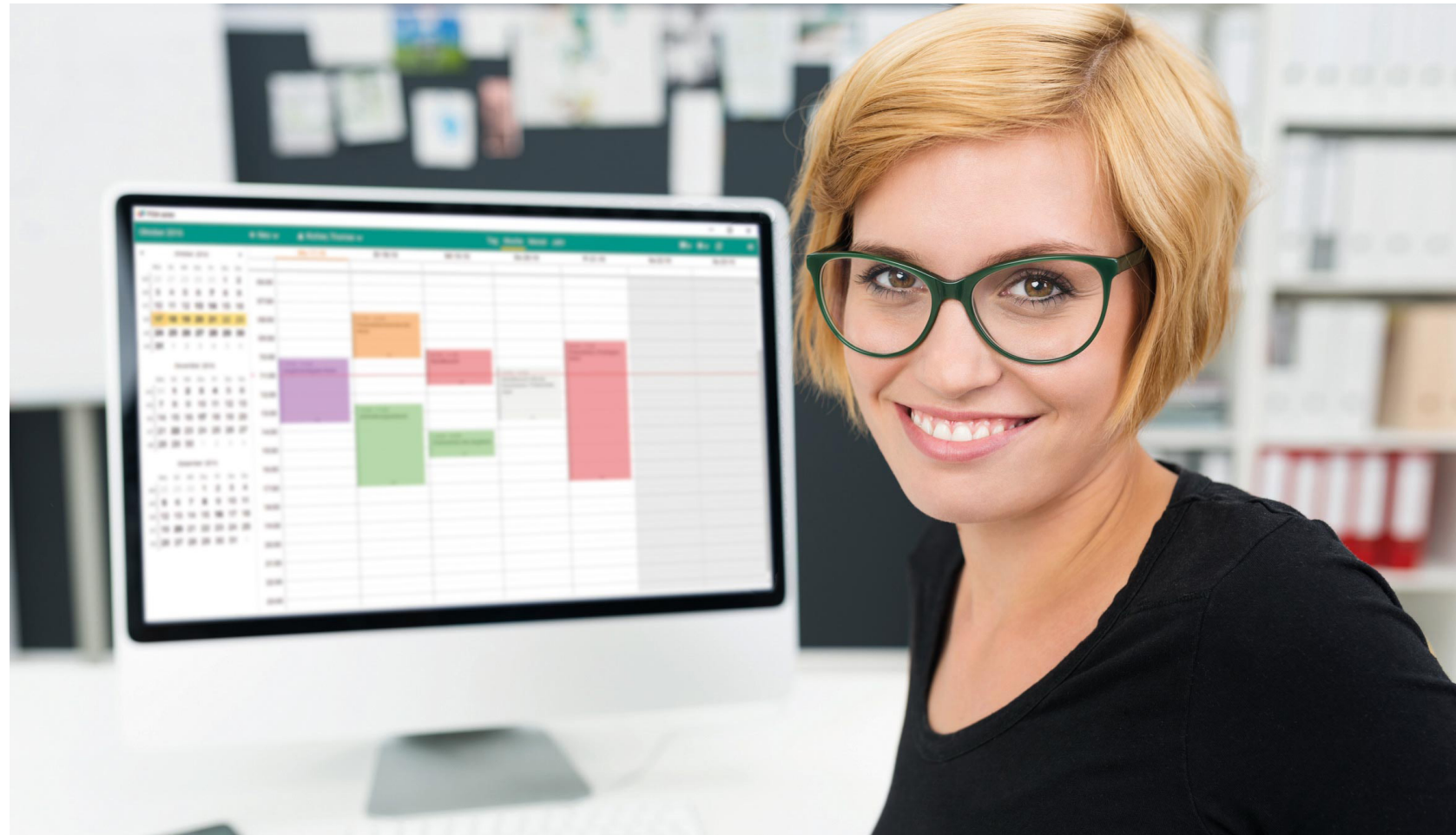
That way, even months or years later, you will still be able to see who undertook what in connection with which contact or case and when they did it. The ease with which the system allows you to plan your work will afford you the convenience of a meaningful calendar. And that calendar will automatically synchronize with your Outlook or Lotus Notes diary.

Automated workflows and state-of-the-art collaboration tools such as the chat within the PiSA sales CRM will help you to improve productivity and strengthen in-house collaboration.

A CENTRALIZED SYSTEM
FOR ALL CONTACTS
AND ACTIVITIES

Marketing

Achieving more on a smaller budget



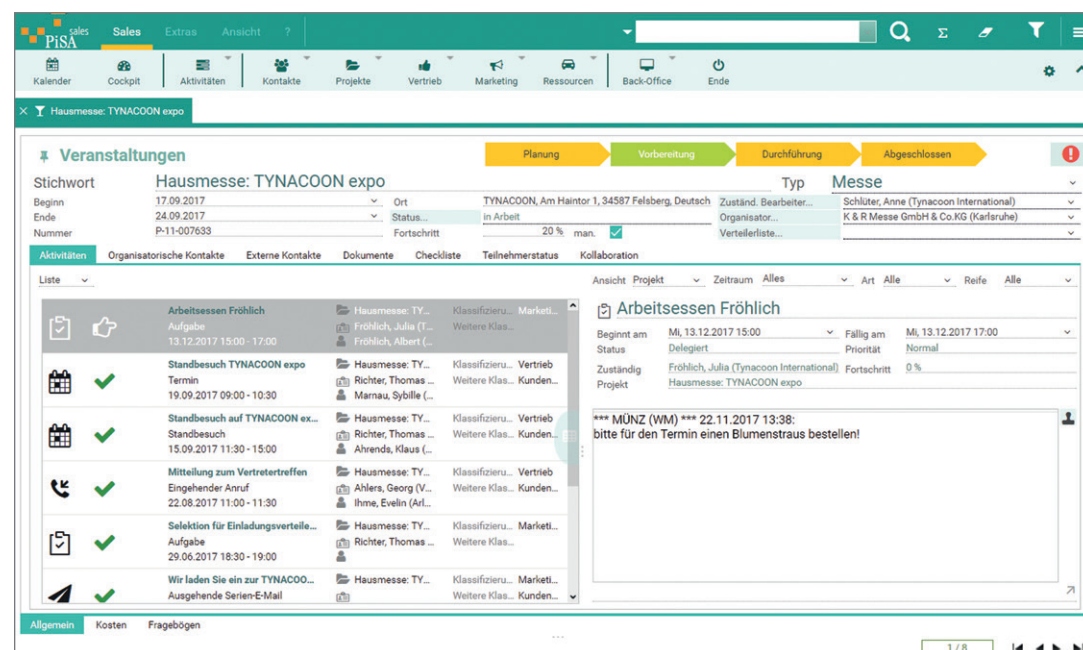
The PiSA sales CRM offers powerful features to bring your marketing operations on course to greater success. It will enable you and your team to keep close track of all your planned and ongoing activities on the back of ready access to all the information you need on to-do's, contacts, documents, milestones, marketing targets, intermediate results, meetings, and budgets.

A booster for your marketing campaigns

PiSA sales CRM will enable your marketing department to perform more effectively, to increase its efficiency through automation, and to chart all its processes and activities transparently. The system covers everything from the planning and preparation of events to press operations, telemarketing campaigns, and professional email marketing. Real-time analyses and response gauging will help you to instantaneously determine which marketing channels produce the best results. Powerful functions such as a filtering tool for the quick and precise selection of target groups, the ability to effortlessly import address data, or a questionnaire module for customer surveying and automated fair reporting are just some of the highlights.

Sorted and organized

- ✓ convenient GDPR admissibility check of marketing contacts lists
- ✓ interactive marketing calendar
- ✓ systemized management of events, telemarketing campaigns, and publications
- ✓ full cost control and budget planning
- ✓ multi-level target-group selection
- ✓ easy mass importation of address data
- ✓ digital documentation of tradeshow reports and market surveys
- ✓ customer-satisfaction analysis
- ✓ professional email marketing
- ✓ response management
- ✓ ...



MADE FOR
HIGH PERFORMANCE
MARKETING

Sales

Innovative tools to help you forge your success

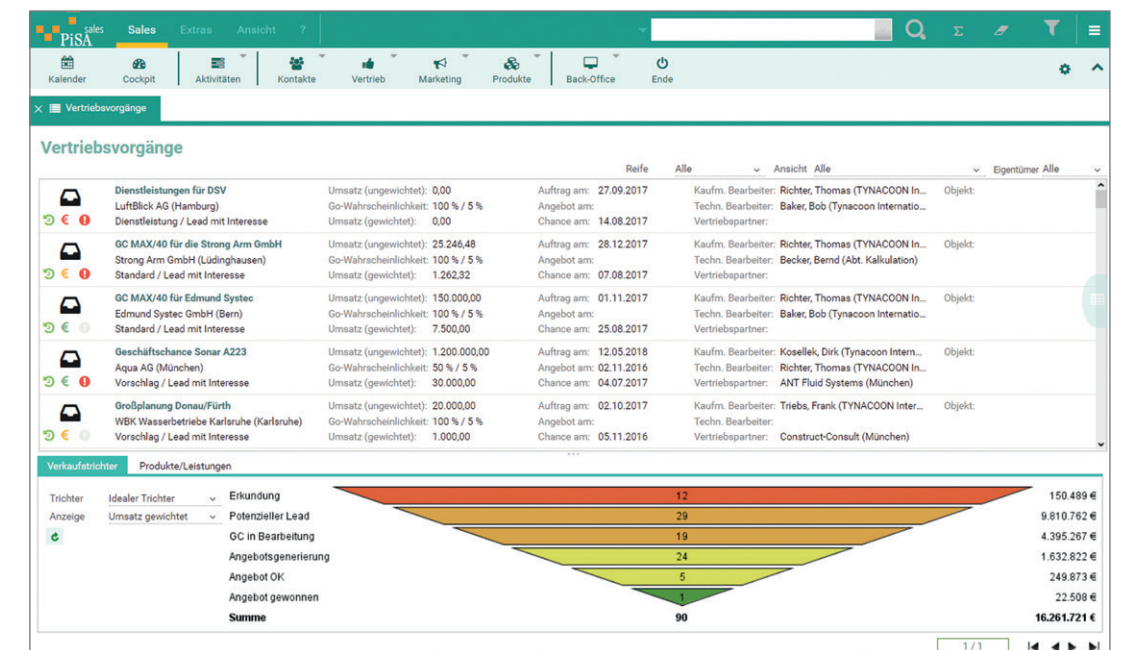
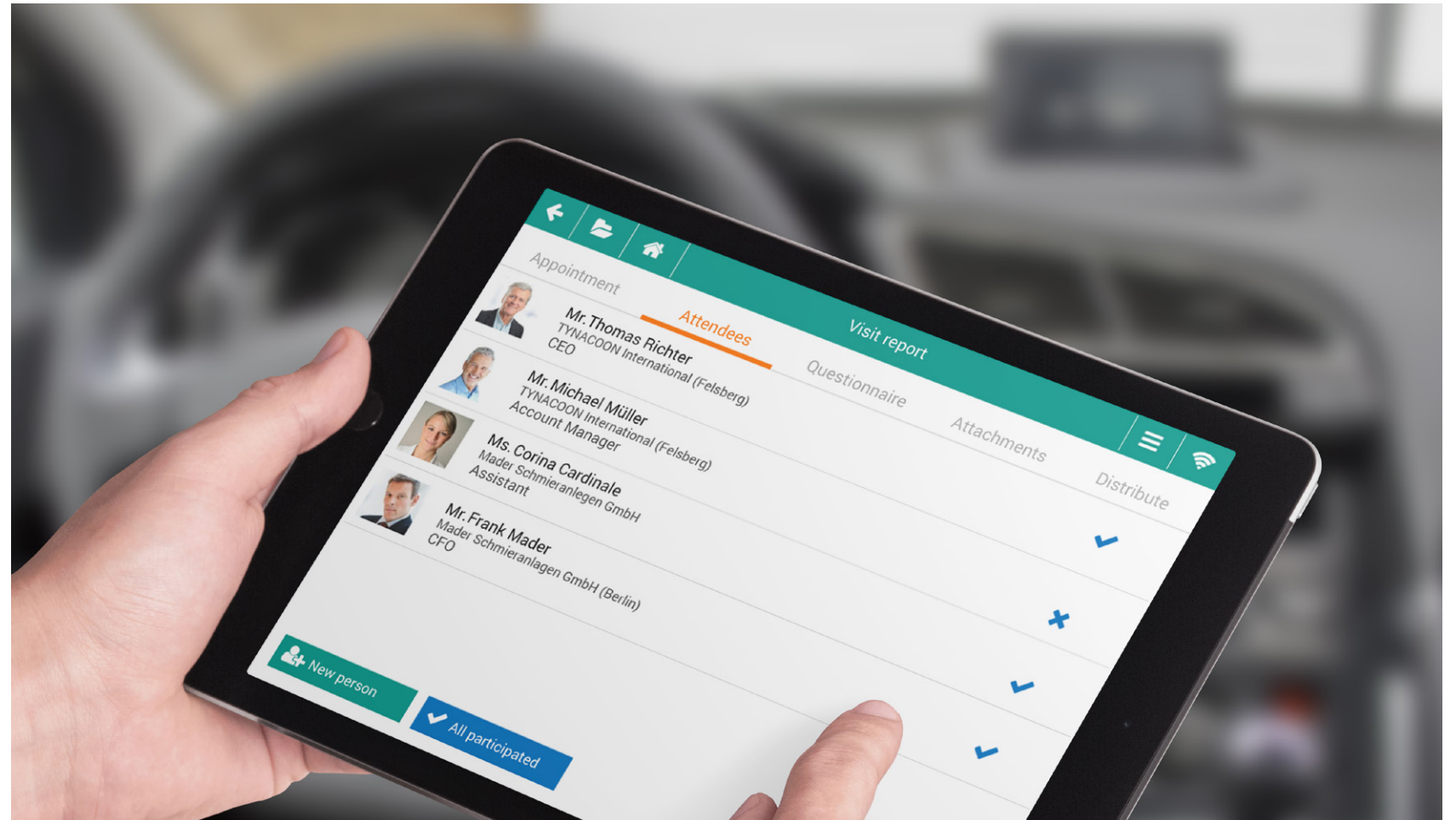
The success of your business relies, not least, on maintaining transparency across all sales phases. We offer you the right tools for efficient and profitable sales operations. The PiSA sales CRM is designed to provide the support you need at every stage—from initial customer inquiries to quote preparation and all the way to contract—and in a single, centralized system.

Thoroughly informed and professionally prepared

The system allows you to optimize and automate your field operations using digital visit reports, to use 360° perspectives on your customers or prospective customers, and to work through your to-do's and appointments more time-efficiently. It will also help you with the professional configuration and calculation of quotes, the analysis of business potential, and evaluation of the sales funnel. Our mobile CRM solution means you will have access to all your information—online or offline—anywhere, anytime. You can even give your business partners a seamless connection to your system via a portal setup.

Exceptionally efficient sales management – huge time savings

- ✓ cross-departmental lead management
- ✓ centralized management of business opportunities, quotes, and job orders
- ✓ workflows for each sales phase
- ✓ forecast analysis, sales funnel, and reports—all at the tap of a button
- ✓ multiple language configuration of quotes and quote calculation
- ✓ product and service database
- ✓ evaluable visit reports with automated follow-up
- ✓ mobile CRM for field service
- ✓ system connectivity for business partners via portal
- ✓ unparalleled solutions for contract and project business
- ✓ comprehensive competitor analysis



MORE EFFICIENCY FOR
GREATER PROFITS THROUGH
SATISFIED CUSTOMERS

Service

Customer satisfaction—the ultimate challenge



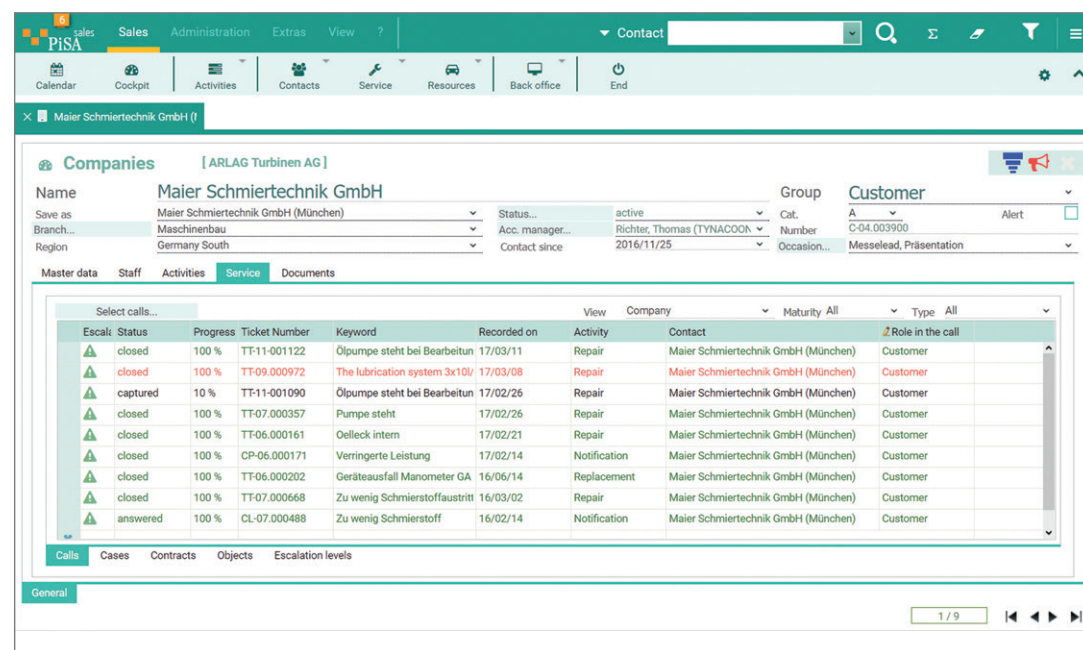
For today's businesses, the customer-service challenge is twofold, with both the individualization of services becoming more and more important and concrete demands increasingly being made on those services. The PiSA sales CRM facilitates your entire service process with functionality that is unparalleled on the European market. Discover what the leading service CRM can do for you.

Why settle for less?

Our software provides the total modular package of functions for all your service processes—from the time of service request to service quoting all the way to the planning and execution of service assignments. The system allows your service operatives to prepare service reports immediately on site after completion of an assignment in the field, to verify those reports through electronic signature, and to instantly dispatch them for customer billing. It lets you keep track of all processes and monitor your service forecast, your high-service products, and your employee work loads. Your field operatives and office-support staff alike will appreciate the user-friendliness of the system as well as its mobile availability on smartphones, tables, and notebooks.

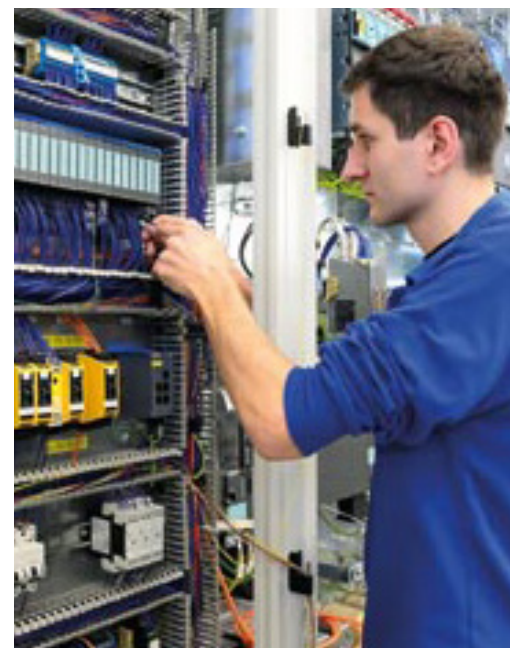
Sophisticated functions that enable perfect customer service

- ✓ 360° view on service histories and on products subject to service obligations
- ✓ ticketing, complaint, and disruption management
- ✓ comprehensive mapping of base installations
- ✓ contract management
- ✓ automated maintenance management
- ✓ planning board for assignment scheduling, incl. resource and skills scheduling
- ✓ service-appointment feedback
- ✓ knowledge database featuring FAQs and error codes
- ✓ mobile service on smartphones, tablets, and notebooks
- ✓ ...



The screenshot displays the PiSA CRM interface. At the top, there's a navigation bar with tabs like Sales, Administration, Extras, View, and a search bar. Below this, a sidebar shows 'Companies' with a list of entries. The main area shows the details for 'Maier Schmiertechnik GmbH', including its status, group, and contact information. A table below lists various service calls with columns for status, progress, ticket number, keyword, recorded on, activity, contact, and role in the call.

Select calls.	Escal.	Status	Progress	Ticket Number	Keyword	Recorded on	Activity	Contact	Role in the call
closed	100 %	100 %	100 %	TT-11-001122	Ölpumpe steht bei Bearbeitung	17/03/11	Repair	Maier Schmiertechnik GmbH (München)	Customer
closed	100 %	100 %	100 %	TT-09.000972	The lubrication system 3x10l/	17/03/08	Repair	Maier Schmiertechnik GmbH (München)	Customer
captured	10 %	10 %	10 %	TT-11-001090	Ölpumpe steht bei Bearbeitung	17/02/26	Repair	Maier Schmiertechnik GmbH (München)	Customer
closed	100 %	100 %	100 %	TT-07.000357	Pumpe steht	17/02/26	Repair	Maier Schmiertechnik GmbH (München)	Customer
closed	100 %	100 %	100 %	TT-06.000161	Oelleck intern	17/02/21	Repair	Maier Schmiertechnik GmbH (München)	Customer
closed	100 %	100 %	100 %	CP-05.000171	Verringerte Leistung	17/02/14	Notification	Maier Schmiertechnik GmbH (München)	Customer
closed	100 %	100 %	100 %	TT-06.000202	Geräteausfall Manometer GA	16/06/14	Replacement	Maier Schmiertechnik GmbH (München)	Customer
closed	100 %	100 %	100 %	TT-07.000668	Zu wenig Schmierstoffaustritt	16/03/02	Repair	Maier Schmiertechnik GmbH (München)	Customer
answered	100 %	100 %	100 %	CL-07.000498	Zu wenig Schmierstoff	16/02/14	Notification	Maier Schmiertechnik GmbH (München)	Customer



EXCELLENT SERVICE
GIVES YOUR BUSINESS
COMPETITIVE EDGE

Mobile CRM

Anytime, anywhere



The benefits are clear

- ✓ simple to use with the help of native apps, Win or web clients
- ✓ ideal work environments at all times thanks to responsive user interfaces
- ✓ all platforms supported (iOS, Android, Windows)
- ✓ individual adaptability of all masks, fields, lists, and functions
- ✓ optional customer-specific apps
- ✓ online or offline system operation
- ✓ collaborate via chat, push messages keep you up-to-date

THE POWER CRM
THAT FITS INTO
YOUR POCKET

Use the PiSA sales CRM wherever you are and whenever you need to. We have designed ideal user interfaces for each type of end device (smartphone, tablet, notebook). Hence, you will be able to instantly access your crucial CRM data, including contacts, tasks, appointments, routes, contracts, documents, and service data, no matter the time of day or your location.

Perfect tailoring of all processes

Make the best possible use of your time by preparing for and doing the follow-up work on your meetings with customers at your convenience. And that's not all. Anytime access to your company's knowledge base will enable you to refine the quality of your dealings with customers. Your customers and prospective customers will be duly impressed by the professional quality of their interactions with your field operatives and thus with your company and propositions.

Seamless communications between your field staff and back office will accelerate processes and make them more efficient. And your customers, too, are bound to notice and appreciate your efficiency.

Analysis & Evaluation

Facts and figures for a straight route to success



Cockpits



Sales
Funnel



Drill-Down



Trend-
Center

Flexible and individualized

Personal cockpits show you key performance indicators, target-versus-actual comparisons, filter diagrams, watch lists, forecast data, and drill-down results - all in real time.

A special company cockpit gives you a quick overview of customers or traders from the sales, marketing, or service perspective.

You also have the option of charting entire sales regions or other specific views in your cockpit.

Sales funnel & forecast analysis

The system allows your sales and service staff to visualize the sales pipeline as a sales funnel by weighted or non-weighted revenue and from an idealized or reality-based perspective.

You will see immediately the status of your business opportunities, quotes, and job orders as well as being able to determine which items or services they concern.

The transparency thus acquired will allow you to actively manage sales operations using all the readily available and tangible facts.

Getting to the core of things

In the Drill-Down Center, you will be able to define the perspective you wish to be given and how detailed you want your CRM data to be.

A few clicks is all it takes to make definitions for multidimensional analyses, to refine and compress the results there of, and to have those results presented in condensed form in your user cockpit.

Performance indicators such as revenue or quote volumes may thus be analyzed across multiple dimensions, including customers, regions, cases, processes, sectors, or products.

Recognizing trends

The Trend-Center in the PiSA sales CRM lets you flexibly visualize and analyze trends across several dimensions such as staff member, customer, line of business, product/service, region or branch over a time period.

Basing on those trends you can initiate targeted marketing campaigns, derive measures to increase sales and make strategic decisions.

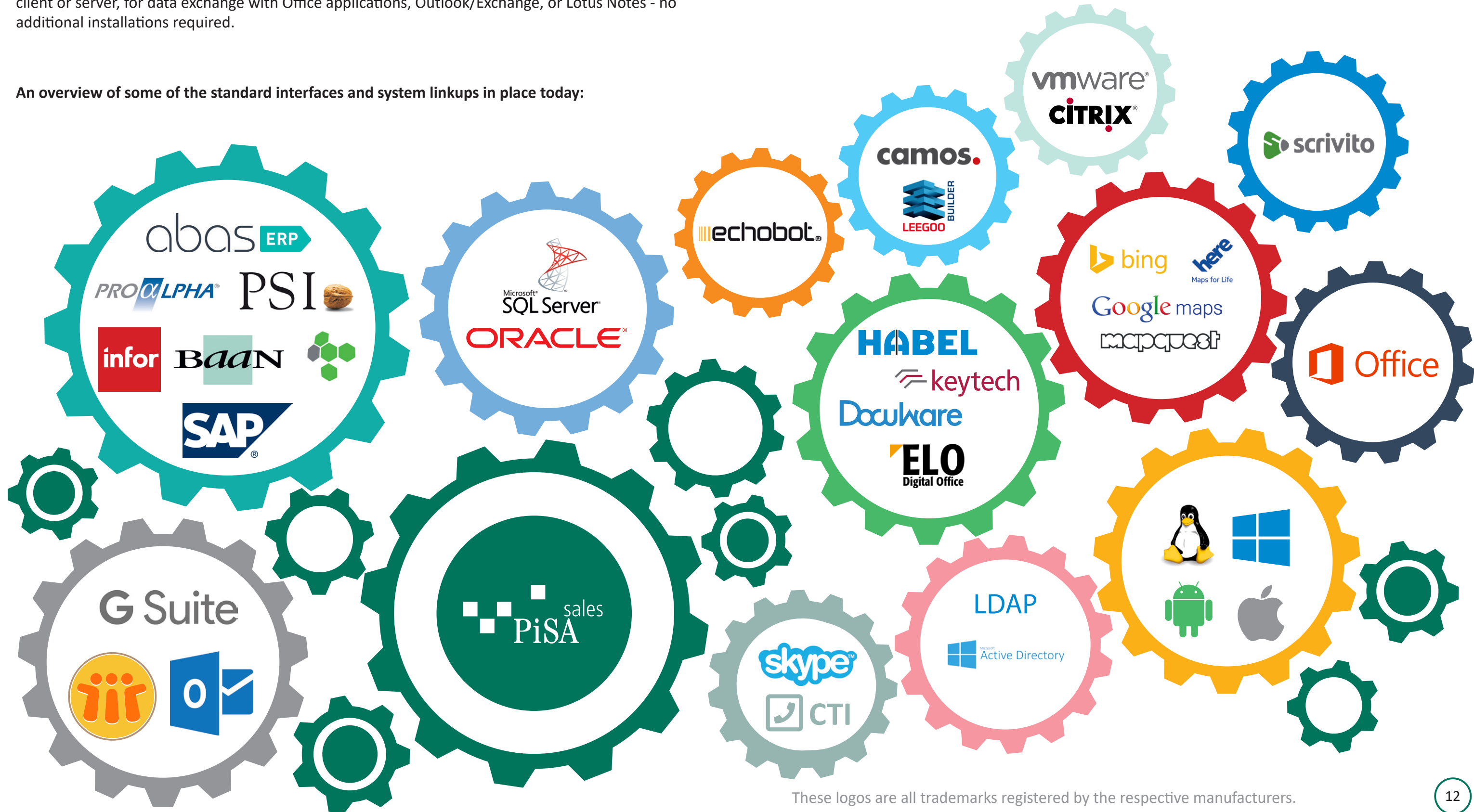
Integration

Build on our experience

IT integration is one of our core strengths. We use open industry standards such as CSV, XML, web services, or the REST-API as well as standard or personalized interfaces or adapted standard linking to accommodate respective scenarios. The PiSA sales CRM offers practical connectors, from the client or server, for data exchange with Office applications, Outlook/Exchange, or Lotus Notes - no additional installations required.

Your operations will benefit from the standard links to ERP systems such as SAP, abas or PSIpenta. We also have literally decades of experience with connecting a great variety of other ERP and DMS systems, phone systems, configurators, and directory services.

An overview of some of the standard interfaces and system linkups in place today:



These logos are all trademarks registered by the respective manufacturers.

Technology & Administration

High-tech, low stress

The PiSA sales CRM is an investment in a sustainable, future-proof software solution. The technology at the core of the system is PiSA cubes, a long-established and continually matured middle-ware.

This innovative repository concept allows you to centrally manage all application-specifying objects in a relational database, thereby making all PiSA sales applications highly flexible, deeply integrable into your IT structure, and unrestrictedly adaptable, upgradable, and releasable across their entire lifecycle.

On the client side, we employ modern industry standards such as HTML5, JavaScript, and CSS3. And our interfaces are based on cutting-edge technology such as XML, web services, direct database coupling, or the REST-API.

The flexible and scalable n-tier architecture of the PiSA sales CRM means you can be assured of outstanding performance even if hundreds of users are accessing the system simultaneously.



“What we particularly appreciate about our partnership with the PiSA sales GmbH is the trusting and professional nature of the relationship, the direct access we have to their development department, and, of course, the powerful and highly flexible software solution it provides us.”

Erwin Zattler, formerly Chief Information Officer,
now Director of the Sanacorp Pharmahandel GmbH

The PiSA sales CRM integrates all customer-proximate enterprise operations into a single solution based on a uniform data model. Connecting your various local and foreign operating sites to the system gives you all the benefits of a shared process landscape and an end-to-end, consistency-guaranteed system.

The PiSA sales CRM comes with multiple language (UNICODE), unit, and currency options and time-zone-management capabilities for deployment around the globe.

Administrators and IT managers will applaud the ease of maintenance and the extensive configuration options for this software. It is entirely up to you how extensively you wish to adapt and administrate your PiSA sales CRM system.

You also have the option of purchasing a developer license for the PiSA sales CRM that will allow you to further develop the system under your own steam.

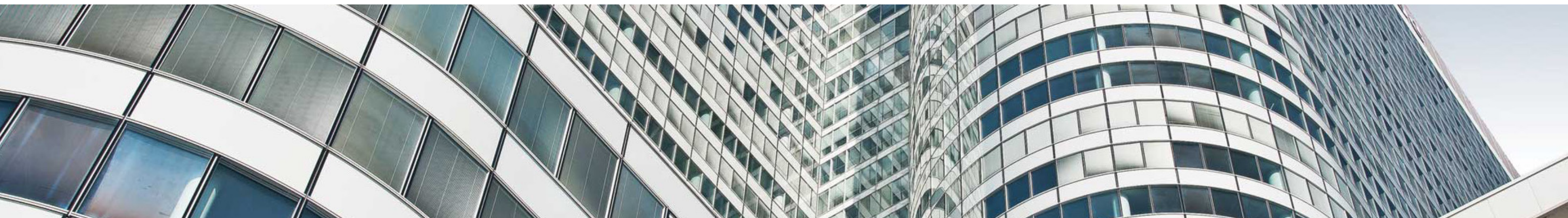
Application administration made easy

- ✓ effortless adaptation of the user interface
- ✓ dynamic field and menu adaptation
- ✓ easy configuration of even complex processes and workflows
- ✓ sophisticated security concept and access definition all the way to the fields-and-functions level
- ✓ parameterizable duplication checking and intelligent data clean-up
- ✓ secure user administration with a comprehensive range of functionalities
- ✓ generation and administration of professional reports
- ✓ mechanisms for ensuring sustainable data quality
- ✓ tracing and log-file analysis
- ✓ analysis tools for application “health checks”
- ✓ scalability through clustering and load distribution
- ✓ ready setup for international deployment, even in regions with network-capacity deficiencies

FUTUREPROOF,
SECURE,
AND EFFICIENT

Cloud & In-House

The best solution for your business



Security and reliability

Running CRM software on your own servers gives you uncompromising control over the entire application. A sophisticated access concept, technology for protected data transmission, and robust system architecture all come together to afford you the ultimate in system security.

So, too, does the PiSA sales cloud solution meet the highest of standards in security, meaning you can rest assured in the knowledge that your CRM data will be hosted at a high-security data center located in Germany and operated in accordance with the stringent data-protection regulations laid down by lawmakers there.

Prices and costs

We offer maximum flexibility when it comes to financing your new system. Choose from a classic licensing option or attractive leasing or lease-purchase arrangements.

PiSA sales' cloud solution is a proposition that makes it remarkably easy to introduce your business to a professional CRM system, with compellingly-priced monthly fees per user.

The security afforded by our hosting partner is validated through independent certification:



Customizing & Integration

The PiSA sales CRM can be geared completely to your needs, irrespective of whether you purchase it outright or run it as a cloud solution. The peerless adaptability of this CRM system gives you the assurance that your particular business model and your processes will all be perfectly defined in the PiSA sales CRM.

The deep integrability of our solutions into your existing IT infrastructure is guaranteed whichever model you opt for.

Support & Training

Because we are a mid-sized enterprise, we know exactly what our SME customers look for in a system provider. Both operating models available for PiSA sales CRM come with comprehensive self-service offerings as well as a host of personal support services to choose from. That support portfolio includes, but is not limited to, classic phone, email, and fax support as well as a customer portal.

Our training packages include user, administrator, and developer training as well as train-the-trainer seminars. We also provide regular webinars and practical eLearning material, so that you can stay on top of your training needs at all times.



Our Service

Full speed ahead for your CRM project

The services we provide help our customers effectively in all phases of their CRM project. Those services include everything from CRM consulting to the accompaniment of project rollouts, training, and continual operating support—all of it straight from the maker of the system, with the reliability of expertise and business integrity that this entails. And because every CRM project is different, our service concept offers the flexibility to accommodate the specific needs of your business.



Competent system introduction

You can depend on our expertise for single-source consultancy, installation, adaptation, training, and startup support. Our time-proven, pragmatic introduction method will have you going live in no time and your investment redeemed sooner rather than later. Our abundant experience will be your reward.



Continuous assistance

Your PiSA sales CRM project manager will be available for assistance from the outset and for years to come. Each and every one of our project managers is a seasoned expert with a wealth of experience in the timely implementation of CRM projects.



24/7 support

Anytime, anywhere availability of self-service support offerings such as video tutorials, an FAQ database, and online ticketing ideally complement the personal support services we provide.



Comprehensive maintenance services

A support hotline manned by qualified professionals plus support by mail, patch and release services, or remote maintenance services as well as a running program of webinars all combine to guarantee the constant productivity of your CRM system.



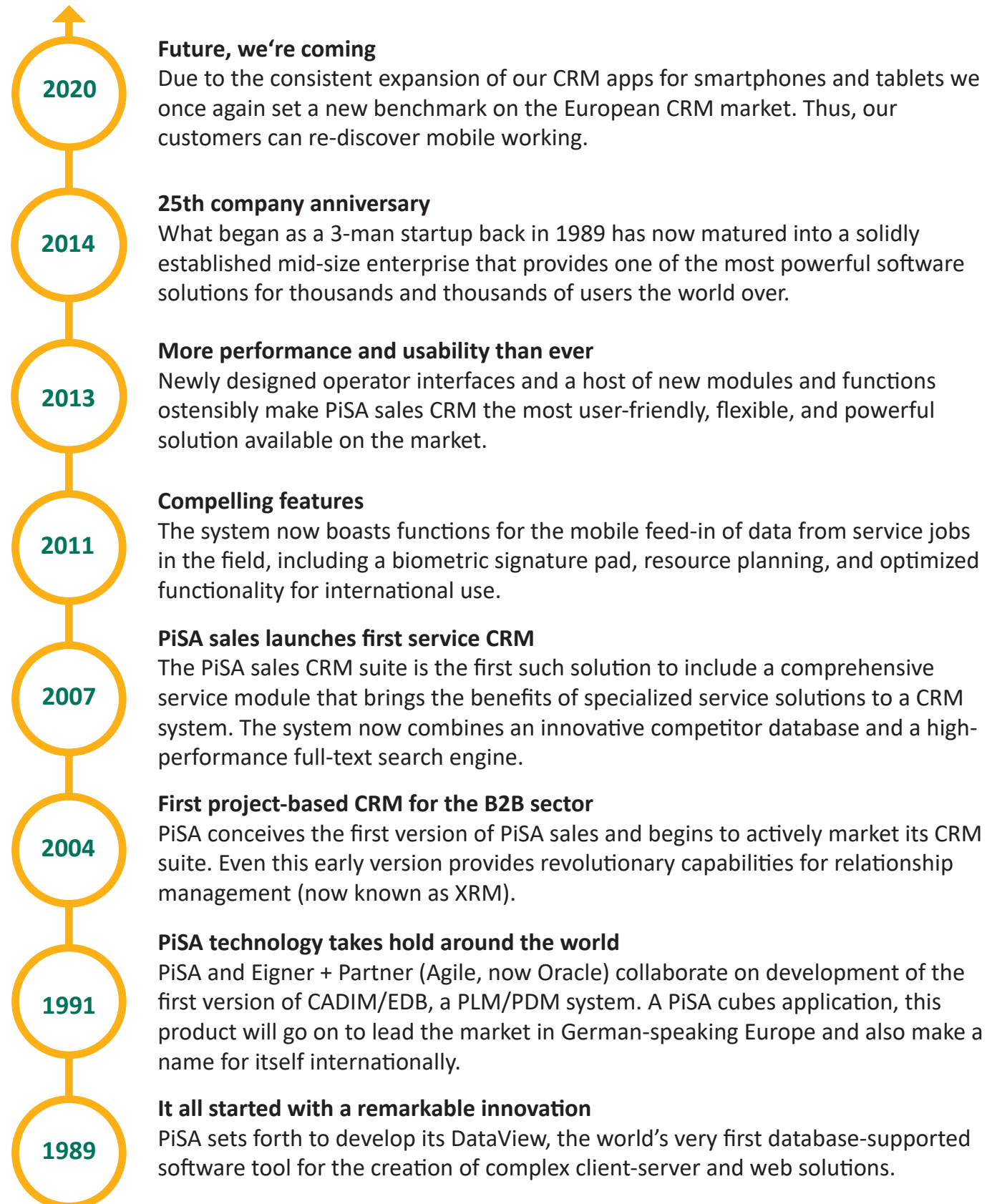
Flexibly scalable services

We offer individualized service solutions tailored precisely to the needs of your business.



Our Story of Success

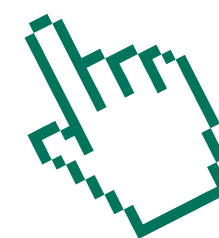
Quality has been our tradition since 1989





We very much look forward to getting to know you!

www.justrelate.com



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