

PiSA sales CRM Apps

for Smartphones & Tablets



Discover the revolutionary possibilities of mobile working.
With the PiSA sales CRM apps, you can expand your scope of activity,
accelerate processes and boost the productivity of your staff
and colleagues.

Go further - go mobile!

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PiSA sales CRM for Smartphones & Tablets

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Highlights

What makes the PiSA sales CRM apps so special

Child's play to use Discover a new level of simplicity

Mobile CRM has never been so easy! An innovative operating concept, large icons, clear masks combined with intuitive touch and speech-to-text operation make the PiSA sales CRM apps a cinch to use.

1

Powerful functions You'll be amazed at the possibilities

The PiSA sales CRM apps are more than just an excellent add-on. Depending on their job profile, users are able to carry out their work entirely by smartphone or tablet. This comprehensive performance is unique on the market.

2

Highly flexible Arbeiten Sie mit Ihrer CRM-App

The PiSA sales app concept offers you maximum freedom. You decide which of the comprehensive standard functions your CRM app will feature, and whether you want to run the PiSA sales CRM app on iOS, Android or Windows.

3

Straightforwardly customisable Platform-neutral, modern and pioneering

Where other providers make things complicated, the PiSA sales CRM with its central repository provides you with an unbeatable advantage: Both the desktop solution and the standard apps from PiSA sales CRM can be fully customised via one central tool.

4

Buy or cloud Use the model that suits you best

With us, the choice is yours: either a classic purchase or convenient rental. If you choose a cloud-based solution, then your CRM data will of course be hosted in a German, high-security data centre.

5

Summary of Features

The PiSA sales CRM apps at a glance

The PiSA sales CRM apps already offer you a wide range of functions as standard. Choose the areas that you need for your everyday work in accordance with your requirements. At your request, we can also build apps that are tailored to your processes and which can be used in an innovative App-in-App concept. Just get in touch! The added value for you: You use apps that are perfectly coordinated with your way of working and at the same time enjoy the advantages of a standard solution.

Persons	Companies	360° view	Tasks	Appointments	Telephone calls
CONTACTS			ACTIVITIES		
Map representation	International addresses	KPIs report	E-mails	Letters & faxes	Notes
Telemarketing	Publications	Events	Business opportunities	Quotes	Orders
MARKETING			SALES		
Trade fair lead capture	Status check	Ad hoc lists	Visit reports	Scopes of delivery	Product & service database
Service calls & tickets	Service quotes	Service orders	Contracts	FAQs & knowledge database	Error codes
SERVICE			Planned & unplanned assignments	Product & service database	Installed base
Planning calendar	Time recording	Feedback			

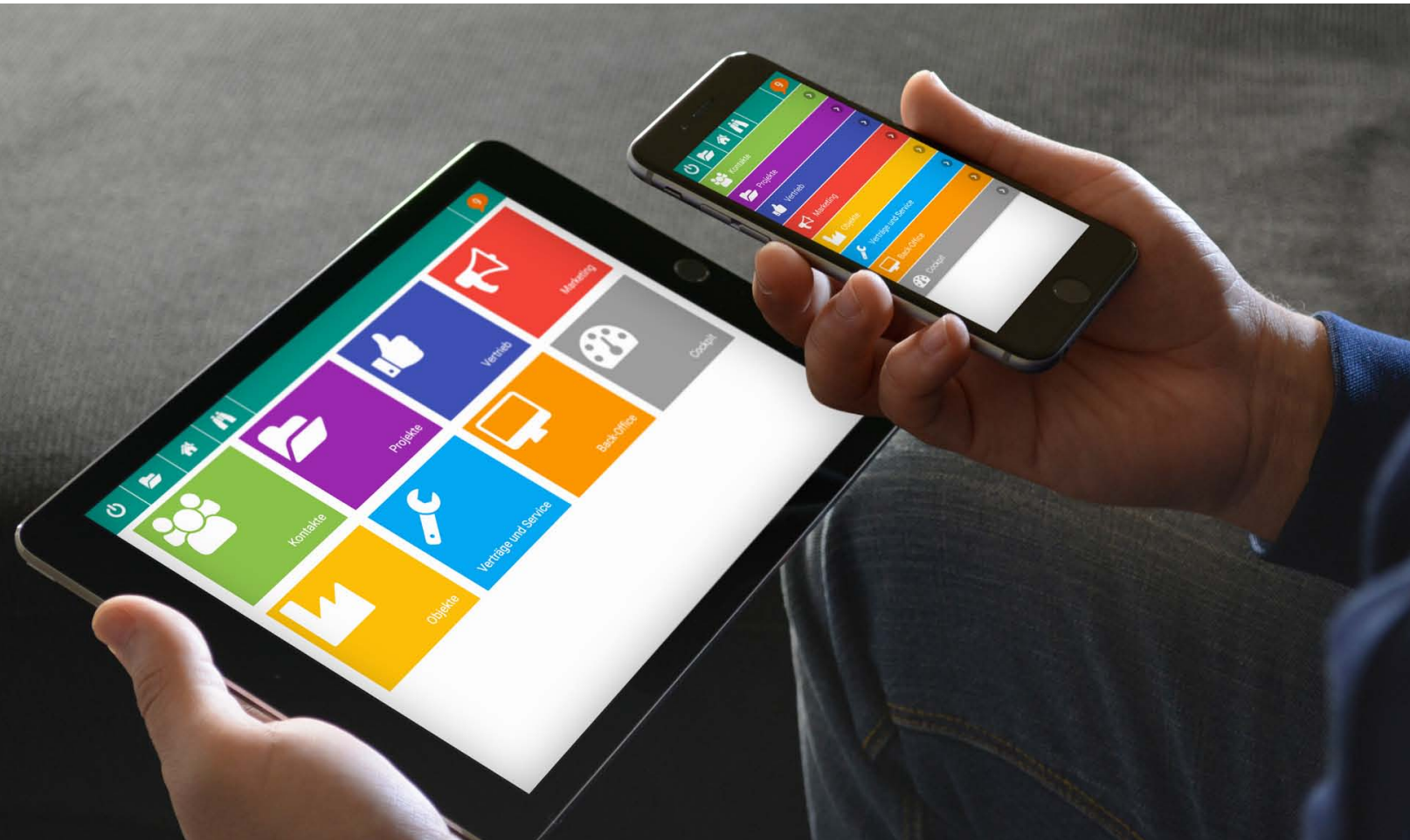


Push messages	Chat collaboration	Direct telephony
COMMUNICATION		
Direct e-mails	Caller ID / CTI	Automatic messaging
Document management	Folders	Upload & download
DOCUMENTS		
Document structures	Quick view	Format-independent
EUREKA full text search	Project folders	Property management
FIND & ORGANISE		
Quick filters	Flexible dashboard	Favourites
Parties involved with properties	Trades	Sub-properties
PROPERTIES		
Three-tier sales	ibau coupling	Duplicate checking on properties



PiSA sales CRM for Smartphones & Tablets

Ergonomics & Operation



The PiSA sales CRM apps are extremely easy to use. With just a tap of the finger, they offer you astonishing possibilities that are unparalleled on the CRM market.

With a simple swipe, scroll through interfaces, while a double-tap on a field puts it into edit mode. You don't have to think about anything else when using our apps. Of course, navigation is always optimised for smartphones and tablets.

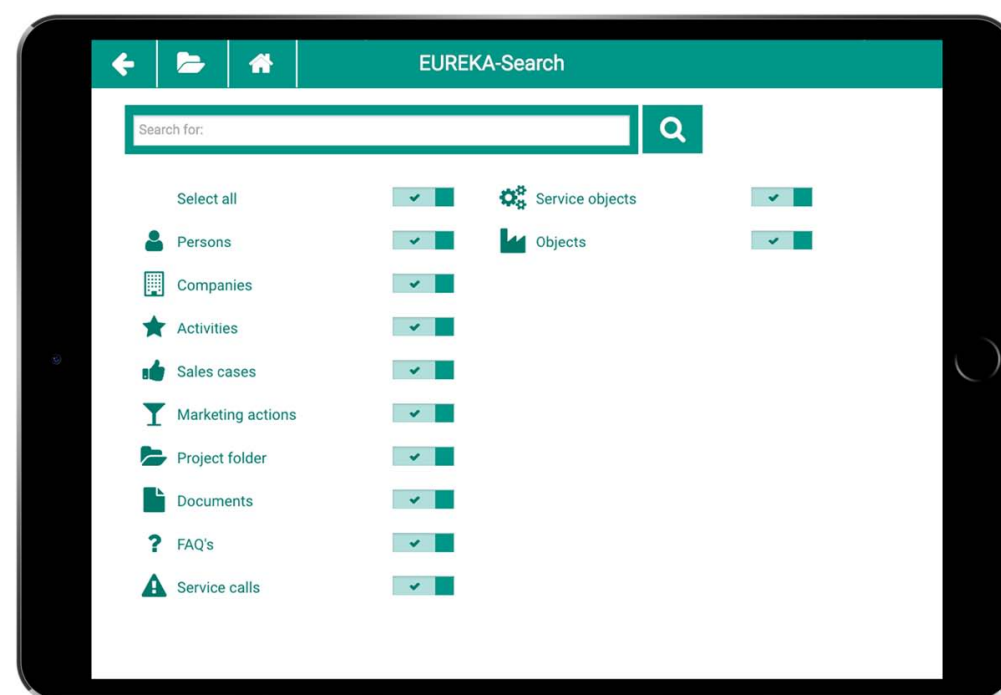
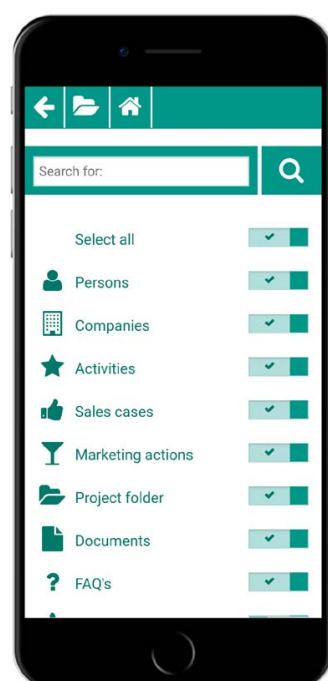
Reach everything with your finger

Once you have logged into the app, the customisable dashboard offers you a personalised entry into the system. Add your most important contacts, current documents and processes as well as a list of to-do tasks for the week to your dashboard, for example. Are you looking for something specific? The EUREKA search engine finds exactly the information you're looking for in mere seconds: contacts, documents, activities, quotes, etc.

Sending e-mails and chat messages or making classic telephone calls are just as easy too. You'll be amazed at how easily it all works.

Look forward to

- ✓ user interfaces in a responsive and modern flat design
- ✓ simple operation with intuitive movements
- ✓ a personal dashboard for rapid system entry
- ✓ friendly and well-structured menus
- ✓ intelligent search and filter functions
- ✓ maximum flexibility
- ✓ ...



THE NEW DEFINITION OF
SIMPLICITY
REDEFINES YOUR WORK

PiSA sales CRM for Smartphones & Tablets

Contacts & Activities

Access to all of the companies and people in your CRM database at all times and on the move - the PiSA sales CRM apps make all this and more possible. Depending on your access rights, you can also find out about all activities such as to-do tasks and histories. With just a few taps of your finger, you can draft visit reports, accept or delegate tasks to the internal sales team or create follow-ups.

Always well-informed and ready for action

Thanks to the powerful EUREKA search engine and a sophisticated system of filters, you can call up companies and people quickly and easily. Depending on the licence, the 360° view offers you an all-round perspective from marketing, sales and service of the contact in question. This allows you to see, for example, what was discussed last, which products the customer has already purchased, whether he is currently being contacted by marketing or whether there are any unresolved service tickets. A report tells you the relevant KPIs for the company in question.

Available for you on the move

- ✓ all contacts, activities, to-do tasks and histories
- ✓ display forthcoming tasks, appointments or telephone calls in the dashboard
- ✓ access according to centrally definable access control
- ✓ direct contact via e-mail or telephone
- ✓ create, delegate, accept and complete tasks
- ✓ appointments with all participants and document attachments
- ✓ card representation of addresses
- ✓ multi-lingual interfaces and content data
- ✓ EUREKA full text search engine across all fields and documents
- ✓ ...



ALL CONTACTS,
COMPANIES AND ACTIVITIES
IN YOUR POCKET

PiSA sales CRM for Smartphones & Tablets

Collaboration



As easy as WhatsApp

The chat collaboration tool in the PiSA sales apps brings colleagues together and offers you the advantages of a real-time messenger for even closer collaboration.

Communicate easily via chat message about processes such as business opportunities, quotes, orders, service tickets, service deployments or marketing campaigns.

All chats are stored as posts on a pin board for the process in question. This means that colleagues involved can determine what was discussed and with whom, even months later.

Security as standard

All data traffic is automatically secured with powerful encryption.

As a result, you can rely on the fact that nobody will be able to spy on it.

The access management system that comes as standard with PiSA sales CRM means that only authorised people are able to read the chat transactions stored in the system.

Follow me!

All of the employees involved with a process are automatically followers and therefore participants in the chat group.

Of course you can also invite other colleagues to your group as followers.

As a follower, you can read the chat transactions, send messages to everyone involved and view which of your other colleagues are online.

And of course you can use emojis too. 😊

Push messages & system messages

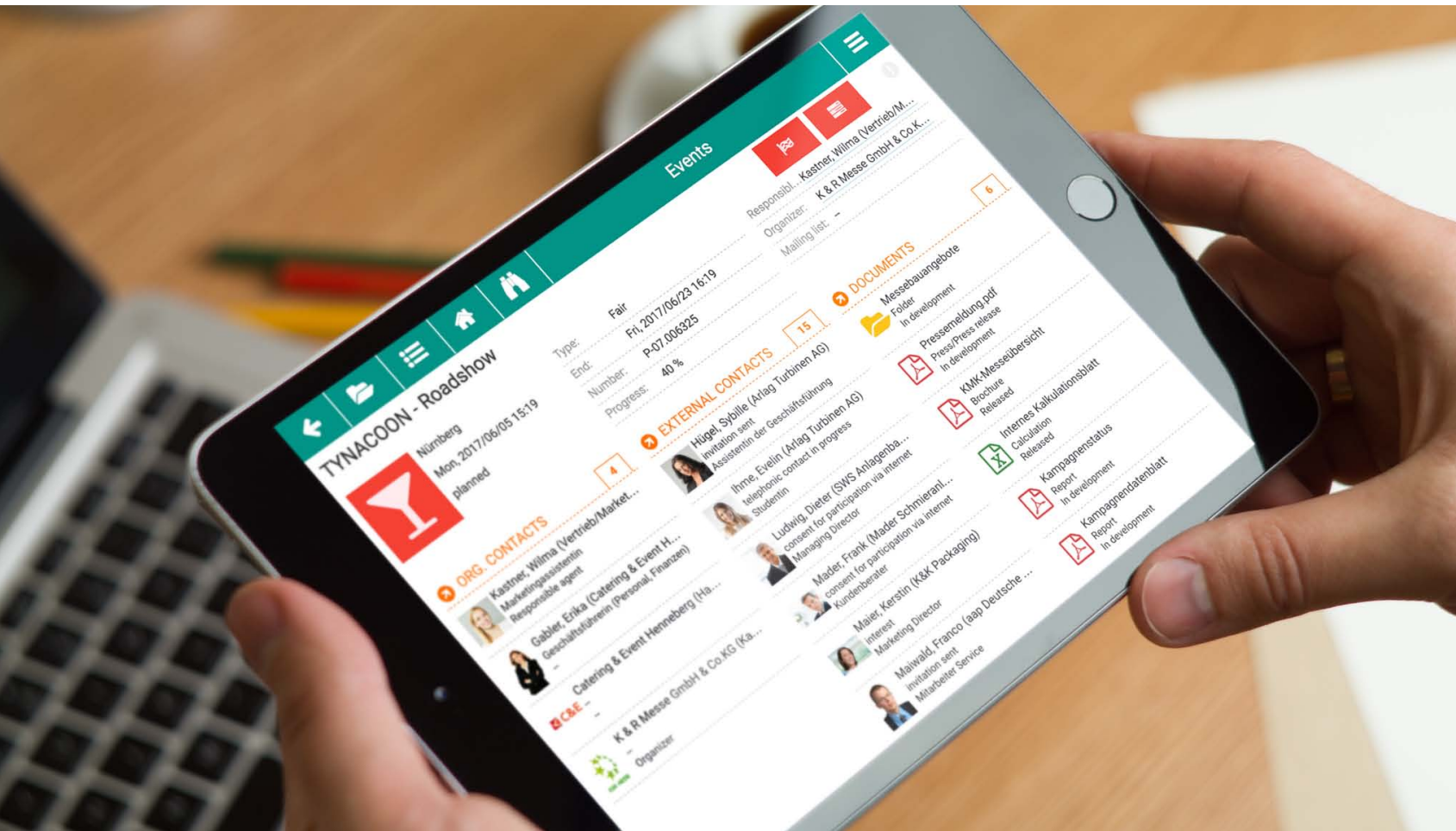
You'll already be familiar with push messages from your smartphone. The PiSA sales CRM sends you automatic system messages and messages from your colleagues to each of your devices. Lightning-fast and reliable!

The great thing is that you not only see immediately when a colleague has posted a message, but you can also find out automatically about new developments in the CRM system (e.g. contract won).

Whether on a smartphone, tablet, notebook or desktop PC - you decide whether and where your messages are displayed.

PiSA sales CRM for Smartphones & Tablets

Marketing



Whether at trade fairs or on business trips - with the marketing apps from PiSA sales CRM, you always have an eye on your current campaigns. Use of the additionally available lead capture function provides the solid base for your electronic lead management.

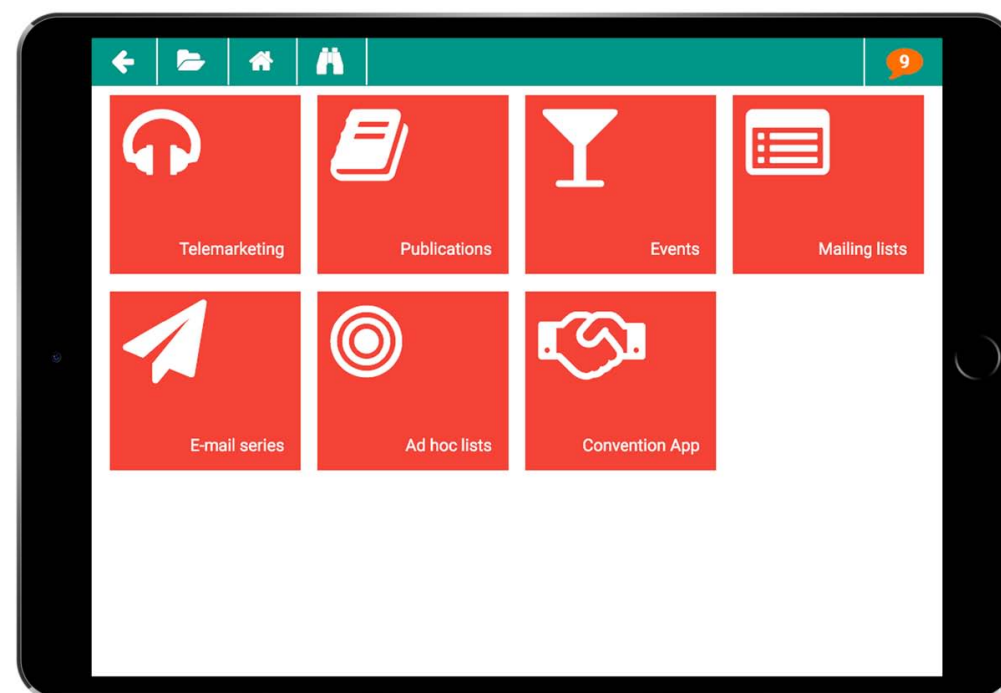
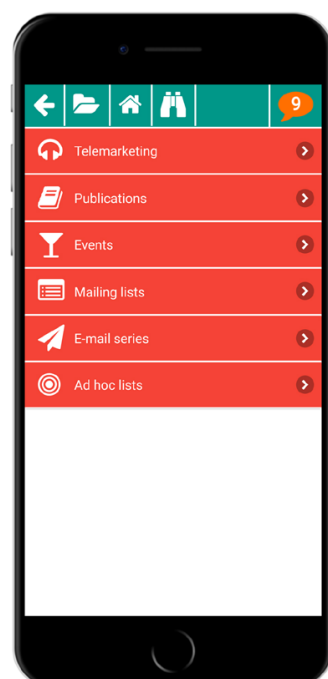
The marketing office in your pocket

All of your organisation contacts, activity histories and to-do tasks, as well as documents about events, publications and telemarketing campaigns are available at the swipe of a finger. The costs, status and key dates for the campaigns in question can therefore be kept easily in view with the PiSA sales marketing app.

This means you're always up to date while you're on the move too, for example about current orders and agreements with suppliers. You also have access to all suppliers, colleagues, prospective clients and customers, as well as their contact details.

Everything at a glance

- ✓ access to and creation of new events, publications and telemarketing campaigns as well as activity histories, to-do tasks, contacts, etc.
- ✓ process-related chat collaboration
- ✓ complete control over the costs and status of ongoing campaigns
- ✓ download of documents (brochures, presentations, etc.)
- ✓ upload of documents and photographs
- ✓ ...



THE MOBILE
WAY OF
MARKETING

PiSA sales CRM for Smartphones & Tablets

App-in-app: Trade fair lead capture

For the mobile lead capturing - at trade fairs, for example - we offer you an app to capture contact data, conversations and drawings or photos quickly, even when there is no internet connection available.

It's that simple

Just make a photo of the business card of your contact person. Thanks to the integrated OCR text recognition and the QR code reader all the contact data will immediately be saved in the system. This makes manually typing of data a thing of the past.

Where other systems only save a handwritten trade fair protocol in the CRM system, PiSA sales goes the extra mile: Via freely configurable questionnaires, you document quickly and easily needs and requirements. The special feature: Depending on given answers, you can initiate processes automatically. In case your counterpart requests a quote, a follow up-task can be automatically generated and delegated to the sales office.

Of course, the collected data will be stored at the respective event and allocated to the respective contacts in the PiSA sales CRM. This enables you to run nearly any kind of analysis und assessment, for example a profound lead evaluation or a transparent cost-benefit-analysis of single trade fairs.

Multimedia support for your conversations

During your conversations use videos, brochures and product information, which you simply open from an integrated media library via fingertip. Moreover, you capture photos and documents with the camera of your device and add sketches or comments to those. Notes can be simply dictated via the speech-to-text-solution of your device in the respective fields.



The benefits are clear

- ✓ reading of contact details from business cards via photograph (OCR text recognition or QR code)
- ✓ customised questionnaires for documenting conversations
- ✓ depending on the documented responses, follow-on to-do tasks are generated and delegated automatically for the internal sales team, for example
- ✓ create, add and upload photographs and sketches - uploading also possible from services like iCloud or Google Drive
- ✓ document written notes via your device's speech-to-text function
- ✓ supplement photographs with manual drawings or letters (redlining)
- ✓ use of videos, brochures, catalogues, etc.
- ✓ multi-lingual interfaces and content data according to device settings
- ✓ captured data is available quickly to other departments thanks to direct integration into the PiSA sales CRM
- ✓ rapid follow-up of trade fairs and efficient tracking of captured leads
- ✓ the app can be flexibly adapted to your needs
- ✓ also works in offline mode - as soon as you are online again, the data is transferred to your PiSA sales CRM database



PiSA sales CRM for Smartphones & Tablets

Sales

Your sales office in your pocket - anywhere, any time. With the sales apps, you can access the entire knowledge base of the PiSA sales CRM while you are on the move, including all of the information you need for your sales activities. And the best thing is, an array of powerful functions saves you time and energy.

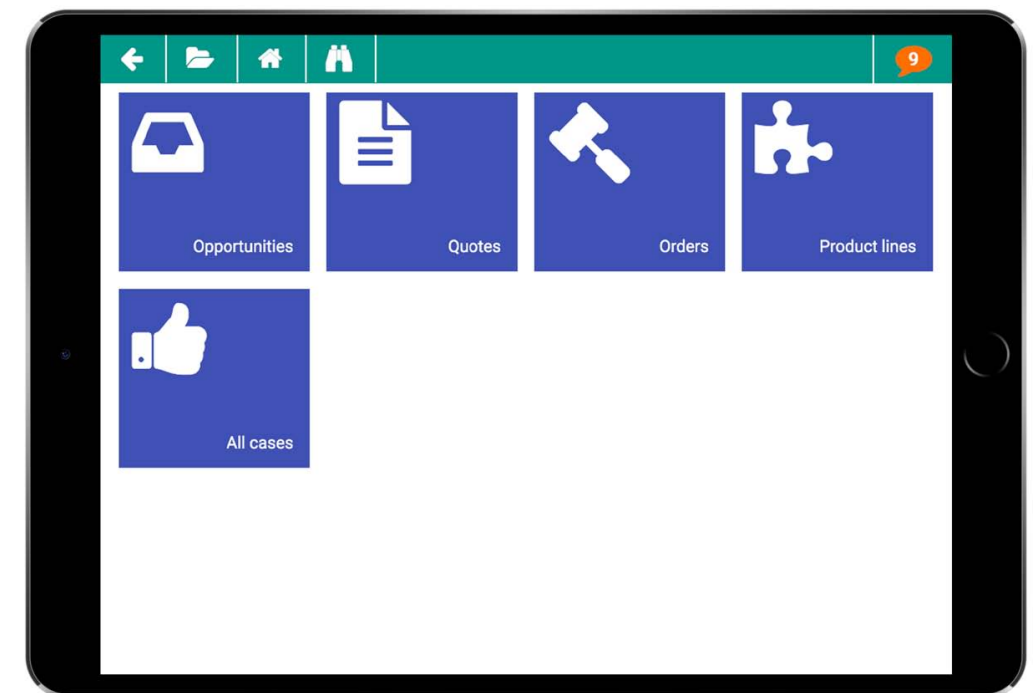
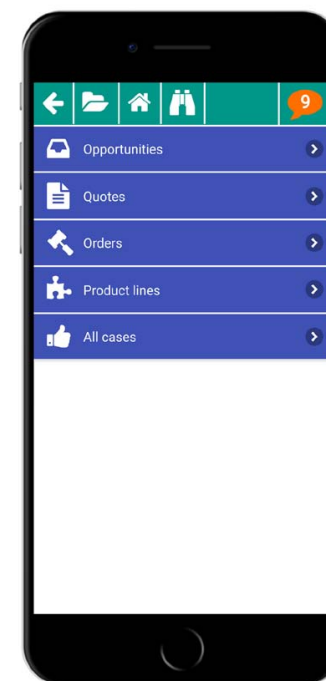
Always well informed

In the field sales team, benefit from rapid and comprehensive access to prospective clients and customers, to-do tasks and histories, appointments and activities as well as business opportunities, quotes, orders, scopes of supply, documents, product data and much more besides.

Plan the route to your next appointment quickly and easily. Documents you need such as presentations or catalogues can be retrieved at any time. Draft visit reports while you are still on site and delegate tasks, for example to the internal sales team. The innovative chat collaboration tool is the hotline to your colleagues in the back office.

Everything you could wish for

- ✓ access leads, prospective clients, customers and competitors and document them
- ✓ access business opportunities, quotes and orders and document them
- ✓ process-related chat collaboration
- ✓ product and services database
- ✓ download and presentation of documents (catalogue, brochures, quotes, contracts, etc.)
- ✓ location display of companies and people on a map
- ✓ simple route planning
- ✓ ...



MADE FOR A
SUCCESSFUL
FIELD SALES SERVICE

PiSA sales CRM for Smartphones & Tablets

App-in-app: Visit reports

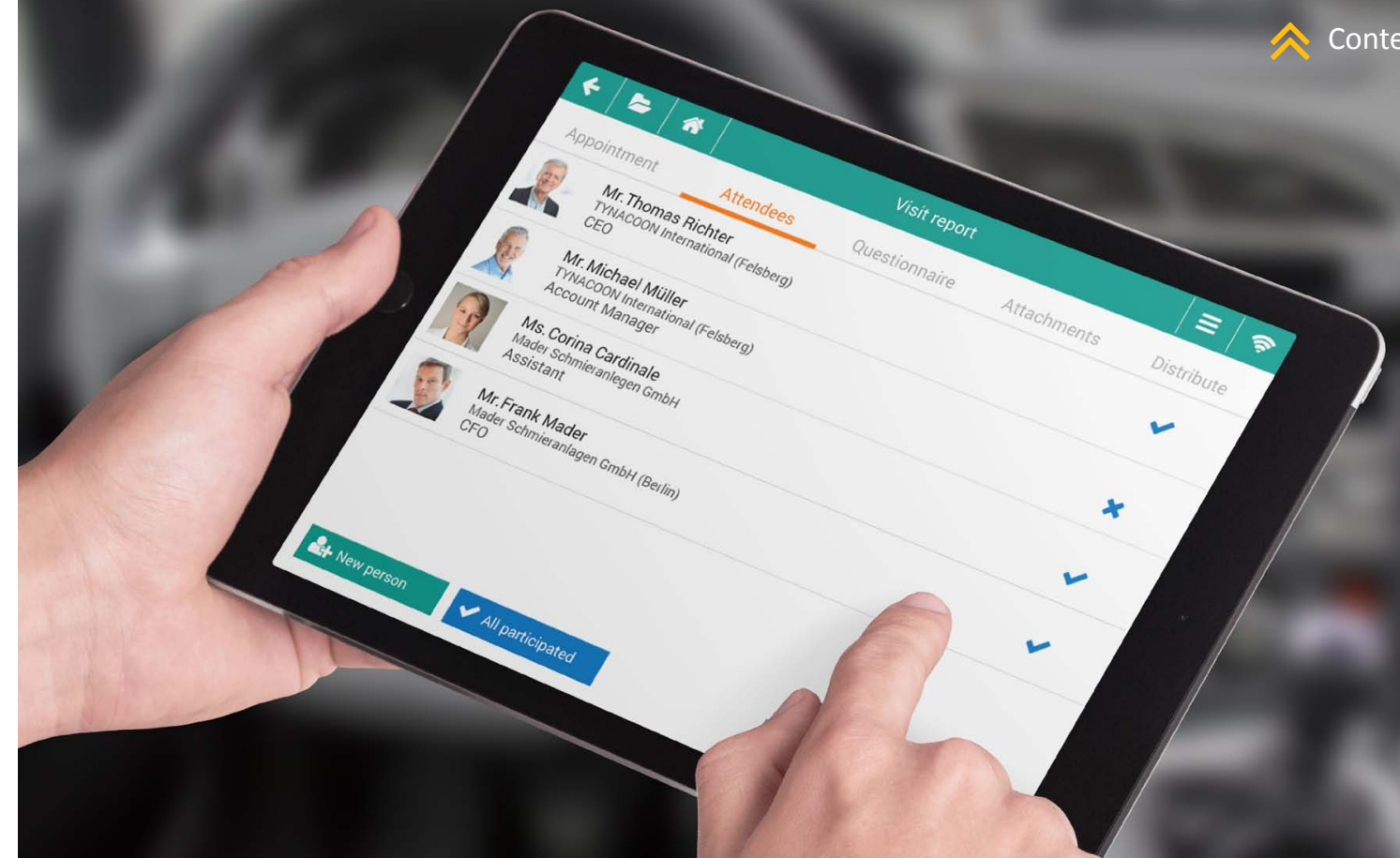
With the visit reports app, you can very easily document contact details, meeting content, requirements, preferences, photographs and sketches. Powerful automatic functions in the background ensure that both the visitor reports themselves and the to-do tasks required that arise from your visits are created automatically and distributed to the right teams and colleagues.

You won't want to be without it

In addition to the comprehensive functions that the PiSA sales CRM app offers you for the field sales team, the visit reports app provides everything you need for the rapid and straightforward follow-up of appointments. You can document participants' contact details manually with ease or with a photo scan of their business cards and note down conversations in freely configurable questionnaires. You can also of course attach photographs, sketches and documents to the report. A simple tap of a finger is all that's needed to document who actually took part in an appointment. The distribution of visit reports to internal employees and colleagues is just as easy too.

You do not need to be connected to the Internet when drafting visit reports. The data captured is automatically transferred to the CRM database as soon as your Internet connection is restored.

By using the visit report app, your colleagues on the field sales team can benefit from the fast and intuitive follow-up of appointments. The documented information is automatically available to management level for analyses and can be used for example as the basis for control activities.



What the app for visit reports and the trade fair app offer you

- ✓ reading of contact details from business cards via photograph (OCR text recognition or QR code)
- ✓ customised questionnaires for documenting conversations
- ✓ depending on the documented responses, follow-on to-do tasks are generated and delegated automatically for the internal sales team, for example
- ✓ create, add and upload photographs and sketches - uploading also possible from services like iCloud or Google Drive
- ✓ document written notes via your device's speech-to-text function
- ✓ supplement photographs with manual drawings or letters (redlining)
- ✓ use of videos, brochures, catalogues, etc.
- ✓ multi-lingual interfaces and content data according to device settings
- ✓ captured data is available quickly to other departments thanks to direct integration into the PiSA sales CRM
- ✓ the app can be flexibly adapted to your needs
- ✓ also works in offline mode - as soon as you are online again, the data is transferred to your PiSA sales CRM database
- ✓ ready to use straight away without any training required

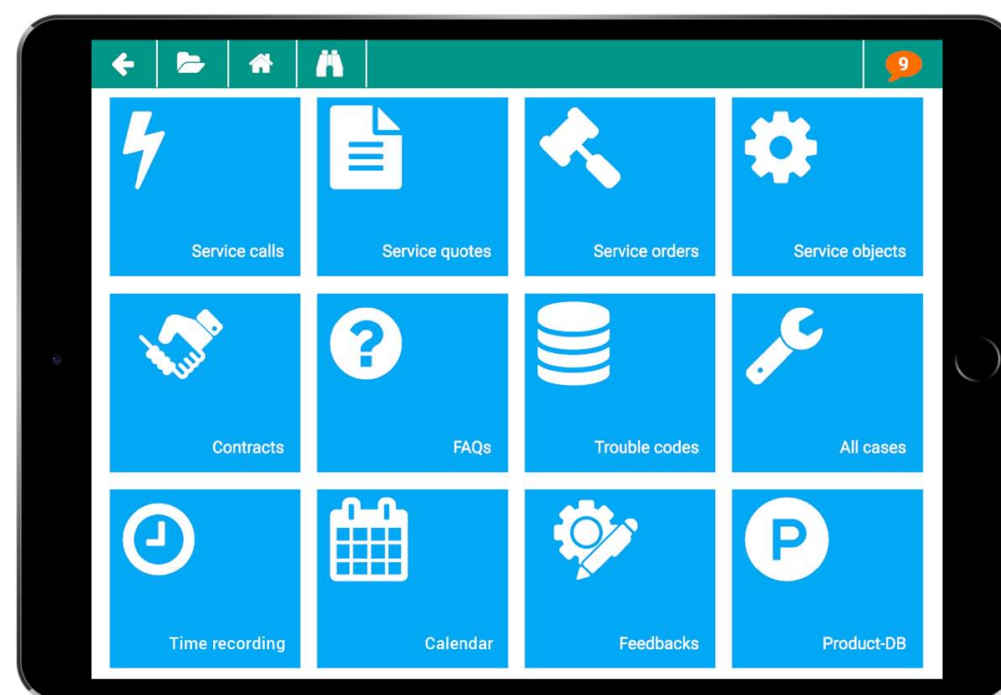
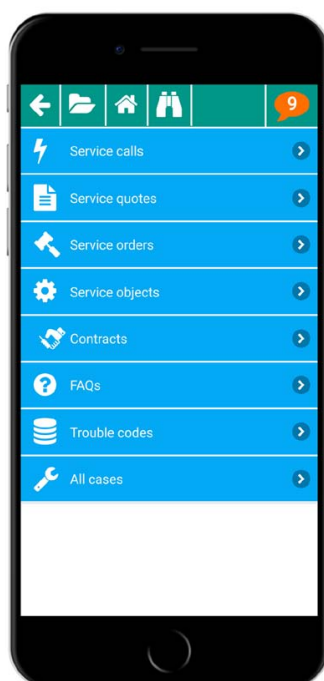
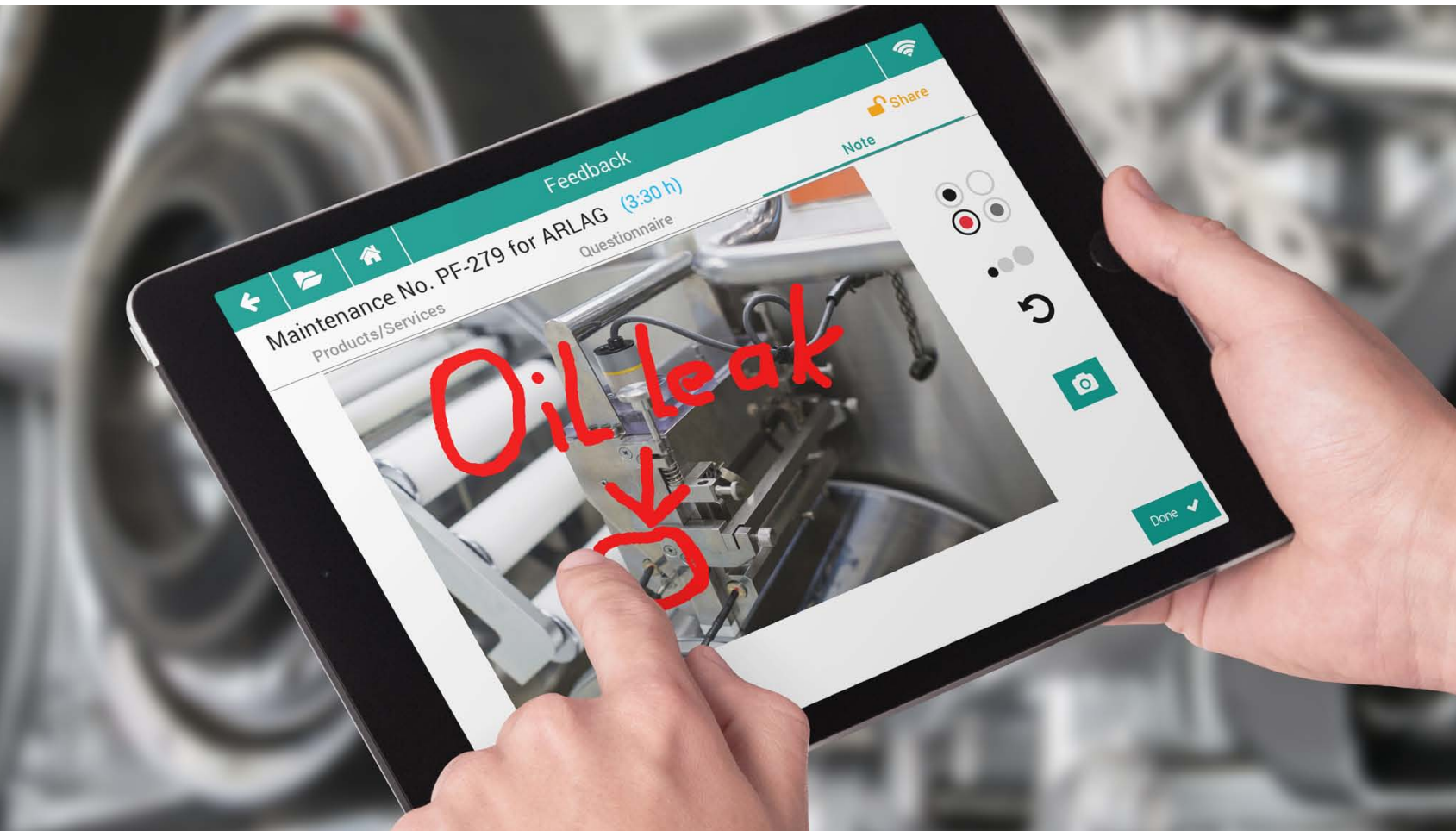
The following features are also available

- ✓ list for selection of outstanding appointments
- ✓ detailed view of the appointment to be documented
- ✓ documentation of the attendance of participants
- ✓ selection of the internal colleagues to whom the visit report is to be distributed
- ✓ ...



PiSA sales CRM for Smartphones & Tablets

Service



Your entire service organisation will benefit from the digitisation of service planning and deployment organisation processes and the seamless communication between the service field sales team and back office. And your customers will come to really appreciate the superbly professional service they receive.

The best apps for your service field sales team

The PiSA sales service apps give you rapid access to all of the information you need for service deployments. Starting with service reports (tickets), service quotes and service orders to appointments, comprehensive data on the service-related product (installed base). A database of FAQs, access to the service history, product-specific documents, service agreements or a database of error codes means that you are always able to deliver excellent service on site. An additional app allows you to document time spent and to feedback the service activities carried out.

Intelligent features for smart customer service

- ✓ access to and creation of new service calls (tickets), service quotes and service agreements
- ✓ the most important information on service processes always at a glance (contacts, documents, service objects, etc.)
- ✓ process-related chat collaboration
- ✓ installed base / service-related products
- ✓ service agreements and database of error codes
- ✓ knowledge database containing FAQs
- ✓ self-planning of assigned workload
- ✓ ...

OFFER
OUTSTANDING
CUSTOMER SERVICE

PiSA sales CRM for Smartphones & Tablets

App-in-app: Time capture & Feedback

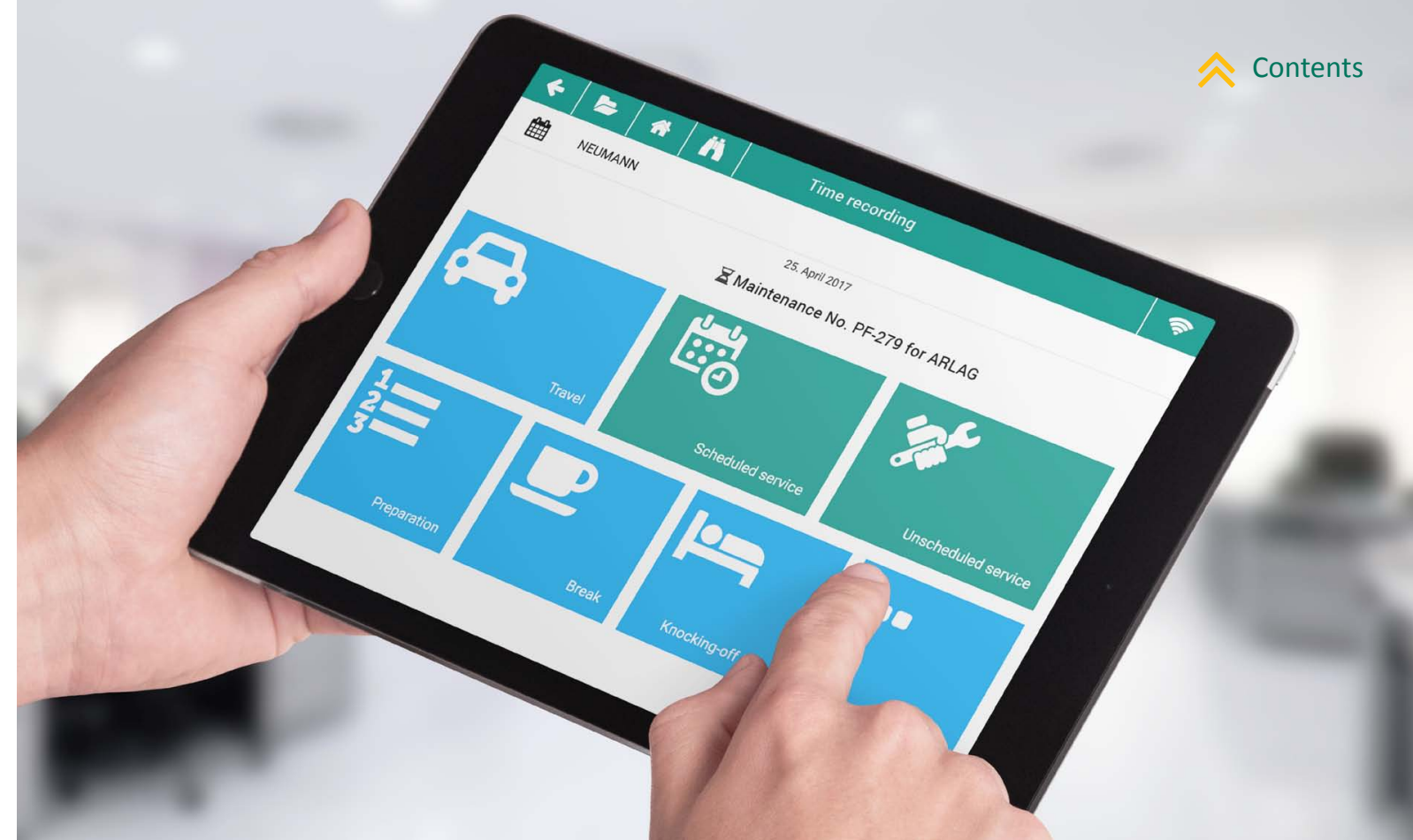
Especially for service engineers on the field sales team, there is a powerful app solution for time capture and feedback from deployments.

With start-stop time capture, you can clock various times on the go such as travel, work preparation, work, breaks and finishing times for planned or unplanned deployments. Of course, all times can be entered later in a time sheet for each working day as well. This time sheet can be passed on to the company data capture team for further processing. This ensures that a seamless timeline is created, mapping and documenting every minute accurately. It is also possible to correct individual time records at a later date or add forgotten time entries.

No more tedious paperwork

The times documented can be then be fed back to head office with the articles and services pre-entered from the service order, as well as installed spare parts, used materials etc. for billing.

Time capture and feedback also works when you are offline. Once the Internet connection is restored, the app automatically re-establishes the connection to the PiSA sales CRM at the company.



What the app can do for your service organisation

- ✓ capture various, individually customisable types of time (travel, work preparation, work, breaks, etc.)
- ✓ simple operation via start and stop button
- ✓ offline mode and automatic connection as soon as the Internet becomes available again
- ✓ processing of planned and unplanned deployments (emergency service function)
- ✓ interruption and resumption of deployments
- ✓ subsequent correction and insertion of times
- ✓ feedback of captured times, spare parts, consumed materials, etc.
- ✓ chargeable partial feedbacks are supported (e.g. multi-day general overhauls, large installations)
- ✓ approval mechanism and possible handover to company data capture department
- ✓ feedback sheet optimally pre-configured with services, articles, etc. from the service order
- ✓ addition of services and articles from a neutral catalogue as well as bought-in parts
- ✓ attach photos, sketches and documents to feedback
- ✓ any additional information, such as customer situation, competitor products, requirements, notes etc. can be entered via a freely configurable questionnaire
- ✓ depending on the documented responses, follow-on to-do tasks are generated and delegated automatically for the internal sales team, for example
- ✓ acknowledgement of the service deployment with the customer's signature
- ✓ approval mechanism and data transfer for billing
- ✓ ...



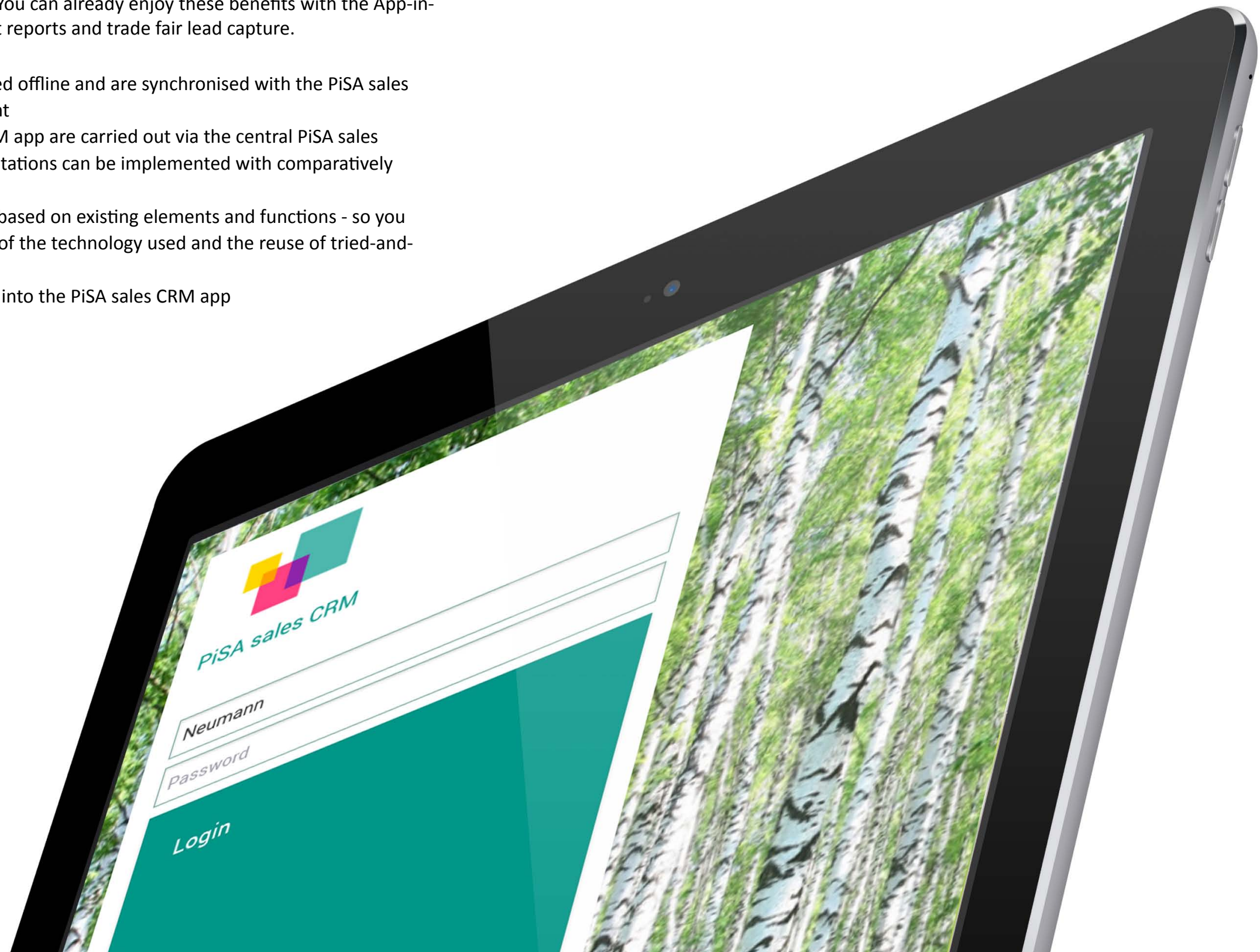
What do you need?

Individual apps

Do you want an app that is tailored specifically to a certain process? Based on our powerful standard solutions, we offer you customised apps. Examples of these include apps for mobile order capture, digital product catalogues or mobile FAQ or knowledge databases.

An innovative App-in-App concept makes this unique flexibility possible and ensures that the apps custom-built for you are loaded automatically in your PiSA sales CRM app. Sophisticated technology ensures automatic updates and upgrades. You can already enjoy these benefits with the App-in-Apps already available in the standard for visit reports and trade fair lead capture.

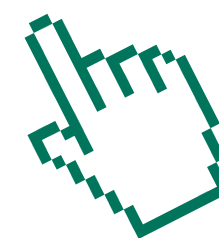
- ✔ all customised App-in-apps can also be used offline and are synchronised with the PiSA sales CRM when a network connection is present
- ✔ adaptations to the standard PiSA sales CRM app are carried out via the central PiSA sales repository; the benefit for you is that adaptations can be implemented with comparatively little effort
- ✔ individual apps are adapted or developed based on existing elements and functions - so you benefit from maximum flexibility in terms of the technology used and the reuse of tried-and-tested components
- ✔ customised apps are automatically loaded into the PiSA sales CRM app and automatically updated





We very much look forward to getting to know you!

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