

Design Manager Advanced is part of the Dialog Manager suite, which is a unique multi-channel solution enabling you to attract, retain and grow customer relationships across traditional sale-, service- and marketing boundaries.

**Design Manager Advanced,**  
DIALOG MANAGER

## WHEN THE "C" MAY NOT BE THE FOCAL POINT



### DESCRIPTION

Design Manager Advanced brings an entirely new dimension into the design and creation of the application.

#### **Put Extended Data (Profile Cards and Lookup Tables) in focus**

The Design Manager Advanced module expands the Dialog Manager suite CRM Application Framework, where all processes revolve around the customer, to now include the ability to make objects the pivotal point - also named "Item Relationship Management".

With this can other company departments with great benefits use the CRM system to solve tasks that are normally only possible in other systems, such as: Contract-, Project-, Document-, Case-, Delivery-, Process- and Workflow Management.

Operational gains are achieved by executing business critical tasks on fewer applications. The user interface is more manageable and easy to approach on just one system. All kinds of segmentation options are increased significantly. The system enables delivery of an unheard of management and cross-organizational overview of very complex people and object relations.

#### **Extended design options**

With Design Manager Advanced can screens everywhere in Dialog Manager be created, changed and deleted in connection with use of Elements (ct. objects). With these options the module includes a long list of functionalities as described below.

#### **Extended Data becomes Main Data**

With Design Manager Advanced can a superuser with only a few property changes remodel an existing CRM solution to exploit this novel facility where Extended Data (Profile Cards and Lookup Tables) can be treated as Main Data (before only e.g. company, branch, employees, etc.). For instance, with a "Project" in focus you can:

- ◆ Register Logbooks
- ◆ Create meetings and tasks in Outlook/Notes
- ◆ Specify campaigns/alerts and "ToDo" lists
- ◆ Mail merge contracts, agreements, etc.
- ◆ Insert contacts and other objects

#### **Search directly in objects**

As Extended Data can become Main Data all search mechanisms as well as collection and list functionality will become available for these transformed Extended Data. Via Design Manager Advanced, the super user only needs to checkmark the information that must be made accessible via lists and search results. Now all the information will be activated and immediately accessible in searches and lists.

### KEY BENEFITS

- ✓ With just one checkmark is "Item" support activated on the relevant application
- ✓ Item support extends the CRM terminology to include ALL kinds of "Relationship Management"
- ✓ The flexibility is as extensive as existing design facilities and can be applied to support all kinds of objects and processes
- ✓ Integration to existing Profile Manager functionality is not restricted, i.e. it is still possible to mail merge directly with/without contact data to Word and email
- ✓ All the Item's Extended Data become accessible in search results and list allowing benefits from using List Layouts for presentation of Item specific data
- ✓ Extended Data may have relations to other Extended Data, for instance an Item activated "Project" can have relations to an Item activated "Product"
- ✓ The user friendliness knows no limits, for instance with support for deleting for Recycle Bin - and restoring
- ✓ It is made intuitively clear for the user that NOW an Item is in focus - as opposed to a contact
- ✓ Integration to Exchange/Domino corresponds to the functionality for a contact, i.e. coupling from Item to email, phone/fax and meetings
- ✓ Adjustable properties for management of references to Item's Extended Data's contact data relations
- ✓ All Profile Manager objects have Item support, for instance can a "Create" object automatically create and fill in a "Product" Item screen

See **FUNCTIONALITY** on back side



- ✓ Extended Enterprise Edition
- ✓ Enterprise Edition
- ✓ Professional Edition
- ✓ Small Business Edition

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## FUNCTIONALITY

The following functionality is included in Design Manager Advanced:

- ◆ Coupling from Item to phone/fax and meetings
- ◆ Mail merge with/without contact data to Word/email (for instance a car in focus as Item is mail merged with current owner's contact data)
- ◆ Possibility to search (quick search and advanced queries) in Extended Data as Items (for instance find "Project", "Activity", etc.)
- ◆ Extended Data as Item can be freely manipulated in lists
- ◆ Support for deleting to Recycle Bin - and restoring
- ◆ Support for deleting relations to the Item - and still maintain the Item record
- ◆ Automatic (optional) reference to contact data on Profile Card inserted on Item
- ◆ Automatic (optional) reference to contact data on Logbook inserted on Item
- ◆ Blue info bar at screen top changes to green when Item is in focus (with independent field specifications)
- ◆ At Item activation is only display the tabs that are relevant to the Item
- ◆ On Profile Card properties it is possible to choose whether it can be inserted as relation to an Item
- ◆ Possibility to insert a contact on an independent Item (option selected in Item properties)
- ◆ Full support for email filing on Items (in Logbook)

## CHECKLIST

- ✓ Object support
- ✓ Item reference
- ✓ Contact reference
- ✓ Exchange/Domino integration:
  - Email
  - Calendar
  - Contacts
  - Tasks
  - Meetings
- ✓ CTI integration:
  - Phone
  - Fax
- ✓ Mail merge:
  - Word
  - Email
- ✓ Recycle Bin
- ✓ Quick search
- ✓ QBE search
- ✓ Green item info bar
- ✓ Reference management