

Profile Manager 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.

Profile Manager, DIALOG MANAGER

PROFITABILITY AND GROWTH THROUGH CUSTOMER KNOWLEDGE



DESCRIPTION

Profile Manager is the client application to Dialog Manager and is the users access to the entire Dialog Manager suite.

In Profile Manager processes for sales interaction, dialog, information and history, marketing, servicing of customers/prospects, employee-communication, logistic and management reporting are managed. All day-to-day tasks are managed in Profile Manager, for example search, creation and modification of data, mail merge and sending of emails etc.

All relations data in ONE place

All information from enterprise data to consumer data are consolidated in a global easy-to-use overview, using a standard Windows interface. Just as easy as creating data it is possible to enable display of data from administrative and backoffice systems (finance, HR, stock, etc.) allowing for a complete overview of, for instance, a Key Account.

Main Data cards contain all the primary information on contacts and objects. As a logical next step it is possible to attach optional Profile Cards with unlimited amounts of extended data on e.g. products, contracts, projects - and all other imaginable related types of data. Especially relevant extended data can be consolidated - or copied - to Main Data level to complete a necessary customer overview.

All correspondence is automatically - or manually - saved in the central Logbook. To ensure retrievable dialog history on the contact/object all phone calls, meetings, letters, emails, etc. are saved here. Most kinds of documents can be attached to a Logbook record, such as a merged document, a meeting presentation, etc. In this simple way you never forget important information that may prove crucial in connection with future negotiations.

Queries and segmentation - on everything

A significant advantage is Profile Manager's query and segmentation capabilities. ALL information in fields and tables - on Main Data, Profile Cards and Logbook levels - is available for queries.

The user can make quick lookups by specifying a criterion for a single field. More advanced queries are made JUST as easy in an intuitive search screen with a depiction of the screen's fields (Query by Example). It is so easy that any user can quickly learn to create advanced segmentation and combinatory queries on e.g. key figures on Main Data and dialog history in the Logbook.

Relationship management for any context

With information divided into 9 different dimensions it is immediately intelligible to create the perfect overview of almost all relationship combinations. Profile Manager only reflects the real world.

KEY BENEFITS

- ✓ Unlimited setup options provide all users with logical and selective access to all information - this creates an invaluable contact and/or object overview
- ✓ High user adaptation flexibility increases user friendliness
- ✓ Unlimited information grouping for intuitive data overview increases user friendliness
- ✓ 9 different dimensions with attachment of extended data enables advanced and logical relationship management
- ✓ Consolidation through dimension hierarchy creates account overview
- ✓ Value copying between screens enables data grouping for crucial contact and object overview
- ✓ All users can create advanced queries and segmentation via intuitive QBE interface (Query by Example)
- ✓ For user friendly overview all list layouts can be manipulated and saved for use on e.g. contacts vs. objects
- ✓ Everyday, manual user tasks such as lookup of "my customers" and "active cases" can be specified as automatic logon jobs generating user specific lists
- ✓ Genuine One-to-One dialogue handling via e.g. mail merge to Word/email based on individual criteria
- ✓ Automatic log of all communication (letters, emails, phone, etc.) ensures full correspondence history on the contact
- ✓ Automatic response handling ensures easy follow-up activities on campaigns

See FUNCTIONALITY on the back



- ✓ Extended Enterprise Edition **Profile Manager**, DIALOG MANAGER
- ✓ Enterprise Edition
- ✓ Professional Edition
- ✓ Small Business Edition

FUNCTIONALITY

The following functionality is included in Profile Manager:

- ◆ Direct access to all information from both system fields and own created fields, tables and screens
- ◆ Handling of both contacts and objects in focus
- ◆ High flexibility through individual user adaptation
- ◆ Automation via system objects
- ◆ Unlimited information grouping
- ◆ Nine dimensions:
 - Parent
 - Company
 - Branch
 - Department
 - Employee
 - Person
 - Private
 - Residence
 - Object
- ◆ 360° image in all dimensions
- ◆ List oriented queries and data manipulation
- ◆ Advanced queries using QBE and DDC
- ◆ Security on user and field levels
- ◆ Mail merge via Word with automatic filing in Logbook
- ◆ History on all inbound and outbound communication
- ◆ Automatic response handling
- ◆ Genuine One-to-One dialog handling
- ◆ Direct mail via letter, fax and e-mails
- ◆ Multi contact data update via contacts and objects in lists
- ◆ Central Lookup Tables for all purposes
- ◆ Delete - and restore - of all data and objects via Recycle Bin
- ◆ Unlimited list combinations
- ◆ List definitions and layout can be saved

CHECKLIST

- ✓ Integration to MS Word 97, 2000 or XP
- ✓ E-mail integration (Outlook / Lotus Notes)
- ✓ Calendar integration (Outlook / Lotus Notes)
- ✓ Meeting integration (Outlook / Lotus)
- ✓ Task integration (Outlook/ Lotus Notes)
- ✓ CTI (PC/Phone system)
- ✓ Client operative system: Microsoft Windows 98, 2000, NT4 or XP
- ✓ Contact relations
- ✓ Object relations
- ✓ Field history
- ✓ System history
- ✓ System log
- ✓ List manipulation
- ✓ List layout