Your Goals. Our Solutions.

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Company Structure

CUSTOMER/VENDOR RELATIONSHIP MANAGEMENT MODULE

الحل الأمثل والنظام الشامل لإدارة الأعمال
The Total solution system for your business

Customer/Vendor Relationship Management

Optimum Customer/Vendor Relationship Management Module is an integrated system for all types of organization's to manage their customer and supplier files electronically be it administrative or financial.

Optimum provides powerful Security and Workflow. Specific system and operational roles can be defined at user or user group levels. A powerful document workflow ensures the smooth flow of documents within the organization. Any number of approval levels can be defined according to the nature of the document.

Core Components:

1. Manage customers & suppliers files.

2. Work-stream Management.

3. Sales Planning & Marketing Management.

4. Project Management.

5. Procurement Planning.

6. Correspondence Management.

7. Services Management (Ticketing System).

Company Structure

Budget

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Customer/Vendor Files

Optimum Customer/Vendor Relationship Management Module can maintain the full information files of both customers and vendors with following features:

√ Classification structure & documentation of customers & vendors.

√ Customers & vendors file includes:

- Basic data such as:
  1. Customer or Vendor Code.
  2. Commercial Registration Number.
  3. Customer or Vendor Name.
  4. Address.
  5. Phone Numbers.
  6. E-mails.
  7. Website etc...

- Contact information, such as:
  1. Procurement officer's name.
  2. Sales Officer's name.
  3. Job title.
  4. Phone.
  5. E-mail etc..

- Financial Data, such as:
  1. Account Control.
  2. Billing Date.
  3. Credit Limit.

- Commercial movements of the sales file:
  1. Quotations.
  2. Purchase Orders.
  3. Delivery Notes / GRN.
  4. Invoices.
  5. Payment Vouchers.
  6. Cash Memo.

- Commercial movements of purchases file:
  1. Request for Quotations.
  2. Purchase Order.
  3. Delivery Notes / GRN.
  4. Invoices.
  5. Payment Vouchers.

√ Reports & inquiries.
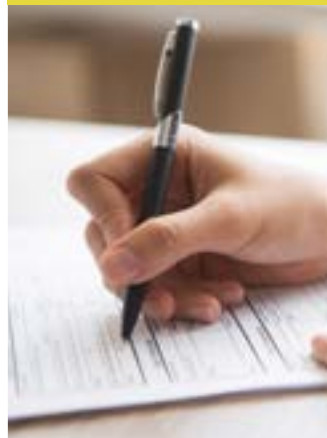
√ Electronic alerts via e-mail.

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Work-Stream Management

Optimum Customer/Vendor Relationship Management Module can maintain the full work stream of any organization dealing with customers or projects with following features:

- √ Multiple level document movement by:
  - Subject.
  - Process.
  - Action.
- √ Link documents to:
  - Subject.
  - Source (customer, supplier or internal).
- √ Move the document by documentary flow & actions until you finish.
- √ Reports & inquiries.
- √ Send reports & alerts electronically via e-mail.

Planning

Optimum Customer/Vendor Relationship Management Module can help create sales and marketing plan of any organization dealing with customers or projects with following features:

- √ Creating a sales & marketing plan.
- √ Send messages & marketing materials electronically.
- √ Send messages & marketing materials via e-mail.
- √ Send messages & marketing materials material by fax.
- √ Send messages & marketing materials via text messages.
- √ Reports & inquiries.
- √ Electronic alerts via e-mail .

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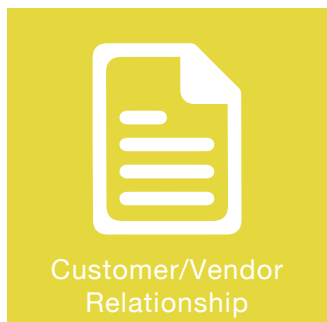optimum

Project Management

Optimum Customer/Vendor Relationship Management Module includes project management follow-up with following features:

√ Multiple number of projects & their related document movement.

√ Connect the customer's project.

√ Scheduling movements by time.

√ Move the document by documentary flow & actions until you finish.

√ Reports & inquiries.

√ Electronic alerts via e-mails.

Correspondence

Optimum Customer/Vendor Relationship Management Module includes the functionality to communicate with the customers/vendors or potential customers/vendors through the system with following features:

√ Send electronic messages & advertising material & circulars via e-mail.

√ Send electronic messages & advertising material & generalizations by fax.

√ Send electronic messages & advertising material & circulars via e-mail.

Customer/Vendor Relationship

Project Management

Customer/Vendor Relationship

Correspondence

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Service Management

Optimum Customer/Vendor Relationship Management Module includes the feature to create document flows for customer services with following features:
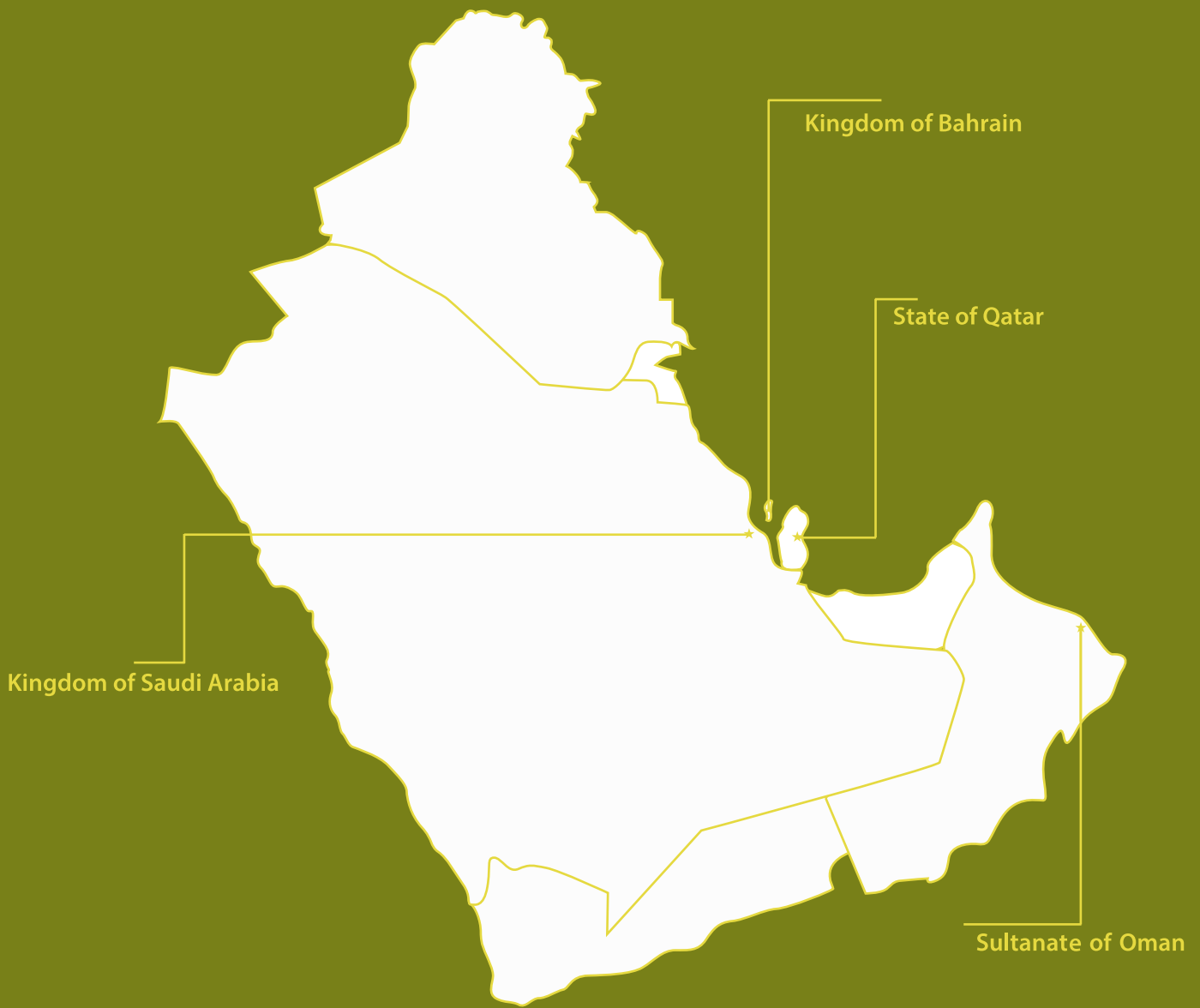
√ Multiple types of tickets.

√ Provide login for customers & suppliers.

√ Establishing internal & external monitoring rules.

√ Follow-up tickets electronically until the completion.

√ Reports & inquiries.

√ Electronic alerts via e-mail.

Customer/Vendor
Relationship

Service Management
(E-Ticketing)

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