

"It's What You Don't Know That Can Hurt You"



[www.vineyardsoft.com](http://www.vineyardsoft.com)

# Business Activity Monitoring



## Client Uses

### Customer Relationship Management (CRM)

Do you:

Have important activities that go uncompleted?

Have managers who are unaware of specific sales opportunities?

Wish you knew in advance about the state of a salesrep's pipeline?

Want to know about prospects who haven't been contacted in 'x' days?

Need to send staff new literature or alert them about new competitors?

Have staff who are unaware when their accounts are modified by someone else?

Wish you could alert salesreps who don't synchronize on a timely basis?

Want to know about sales or support reps with greater than (or less than) 'x' calls, appointments, or sales?

Need to know about clients whose average sale price is greater than 'x'?

Wish you could alert staff about activities due for completion within the next 'x' days?

Need to compare pending order total for a specific item to the quantity you have in stock and on order?

### E-Mail (The Universal Application)

Do you:

Wish you could determine if an incoming e-mail is from a client?

Want to send automated replies in response to incoming e-mail?

Have "generic" mail accounts that are like a black hole for messages?

Wish that you could automatically add the contents of an incoming message to a contact's record?

Need to schedule intelligent and timely follow-up actions based on the receipt of certain e-mail?

Wish you could monitor the quantity of e-mail that you get from various clients?

Have a way to turn incoming e-mail leads into actionable database records?

Know when your best clients e-mail you?

Have a way to forward critical mail messages to an employee's pager, PDA, or cell phone?

Allow clients to update their own support calls via e-mail?

Simply ignore undeliverables?

### Financial Management Applications

Do you:

Have salesreps who are unaware of a client on credit hold?

Wish you could send alerts the instant a client's account reaches a certain level?

Need to send order confirmations?

Want to know about stock that is nearing its re-order level?

Need to tell customers about orders shipped later than expected?

Want to alert customers about purchase bonus programs?

Wish that you could prevent orders with un-approved discounts?

Lose money when you miss out on early payment discounts?

Wish you could spot customers who haven't ordered in over 'x' days?

Need to automatically e-mail dunning notices or client statements?

Have a way to match incoming stock with outstanding backorders?

Need to alert staff to stock surpluses that will be written off if not sold immediately?

## Customer Service & Help Desk

Do you:

Need to know about support reps overwhelmed with open calls?

Want to be alerted if you are about to miss meeting a service level agreement?

Know about service contracts about to expire?

Need instant awareness of delays to field service technicians?

Want to know when a key client logs a high priority support call?

Have a way to immediately spot problem "hot spots" based on call trends?

Need to notify the salesrep linked to a client logging a call?

Wish you could identify reps spending an average of more than 'x' minutes per call?

Know when there are more than 'x' high priority calls assigned to a single service rep?

Know which clients generate the least revenue and most support calls?

Wish you could automatically send a survey back to clients for certain types of closed calls?

Need to know about specific calls that have not been worked on in over 'x' hours or days?

Need to alert field technicians about delays to delivery of critically-needed parts?

Have a way to notify a support rep that an incoming call is for a client with pending sales opportunities?

## Report Generation & Distribution

Do you:

Wish that you could automatically generate and distribute frequently-needed reports?

Have a way to trigger a sales report only if revenues are above or below a certain level?

Need to enable users to request and receive support call reports without bothering a service rep?

Wish that everyday at 5 PM your users could each receive a report of their overdue activities?

Want to avoid sending a blank report to people if there is no data to report on?

Need to e-mail or fax important reports to remote or off-site personnel?

Wish that you had a way to post reports to a website for easy access by business partners?

Wish that you automatically distribute new literature in PDF format?

Need a way to automatically distribute newsletters to clients?

Wish that you could record the fact that a report was sent to a person within his/her contact record?

Have a way to empower users to use e-mail to request the receipt of a specific report?

Need a way to FTP a report to specific recipients?

Have a way to automatically generate and distribute a report based on activities that occurred "today", "yesterday", "last week", or "last month"?

## Supply Chain (MRP / ERP)

Do you:

Wish you knew if the delivery of a specific component needed for a project was delayed?

Need to identify orders with configuration errors (such as missing parts)?

Have a way to monitor product cost and price variances?

Know about suppliers who have a higher than average amount of damaged or defective items?

Have a way to balance stock overages and shortages across multiple locations?

Need to notify staff about project approvals or dis-approvals?

Wish you could be alerted about personnel who won't be available for certain projects?

Have a way to automatically issue standing orders to your vendors?

Need to be notified about scheduled maintenance on manufacturing machines?

Have a way to instantly identify substantial drops in product margin?

Wish you could send an alert about abnormal stock utilization?

Need to alert staff and clients about defects discovered and/or fixed in your products?

Have a way to send an alert about excessive hours logged against a specific project?

Know immediately when exchange rates fluctuate and impact international shipments?