

ALL NEW CRM WORKSPACE



Manage your interactions with existing and potential customers.

WHAT IS CRM?

The acronym stands for *Customer Relationship Management*. In its simplest form, it is a way for a business to manage their interactions with their existing and potential customers. In this form, all communications with a customer are logged, where they can be later reviewed, filtered and used for further communications and analysis.

A CRM solution has the highest benefit when it is connected to your business software (ERP). This allows you to see live and historical sales data for a selected customer or customers. All customer activity that takes place in your business is now available to you in your CRM solution.

WHY WE BUILT OUR OWN

Our customers requested a straightforward CRM system that enables them to send communications to customer groups and track all interactions with contacts at customer sites. Since all necessary data resides in the Picas ERP database, we decided to develop a CRM within Picas instead of integrating Picas data into external third-party solutions. This approach ensures seamless functionality and efficiency for our users.

CRM CAN HELP YOU WITH:

CUSTOMER INFORMATION

Compile all customer information, including recent contacts, purchases, interactions, and reported issues, into one consolidated view.

SALES

Identify sales opportunities.

MARKETING

Prepare personalized marketing & promotional campaigns.

COMMUNICATION

Achieve a higher level of communication with customers.

CRM IN PICAS INCLUDES:

PICAS INFORMATION

Drill into Picas information such as customer volume levels, orders for a selected date range, and any notes that have been created for a customer or contact.

FILTERS

Filter contacts by state, region, territory, class, salesperson, title, etc. Filter for all contacts that have orders shipping in a designated date range or load/trip, orders with partial boxes, and contacts that are x number of trays from a truck delivery.

PROSPECTIVE CONTACTS

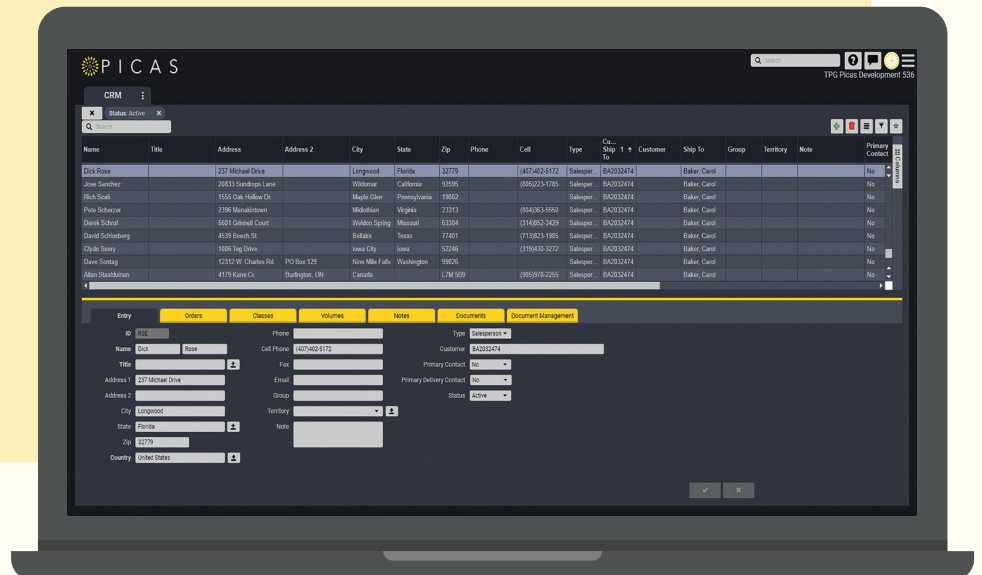
Create pending or prospective contacts.

EMAILS

Push out emails to a selected list of contacts.

ATTACHMENTS

Attach documents and comments to a contact.



WANT TO LEARN MORE ABOUT CRM?

**REACH OUT TO SALES@GROWPICAS.COM
FOR MORE INFORMATION!**