insider
CRM & Office Management

- The integrated CRM & office management solution
- The valuable tool to optimize, control and streamline your business
- The complete solution for your administrative, marketing, sales and finance department
- Easy to implement, learn and use

EFFICIENT CUSTOMER RELATIONSHIP MANAGEMENT

CONTACT MANAGEMENT

Do you have the feeling that you are lost in the pile of contact and customer data you have?

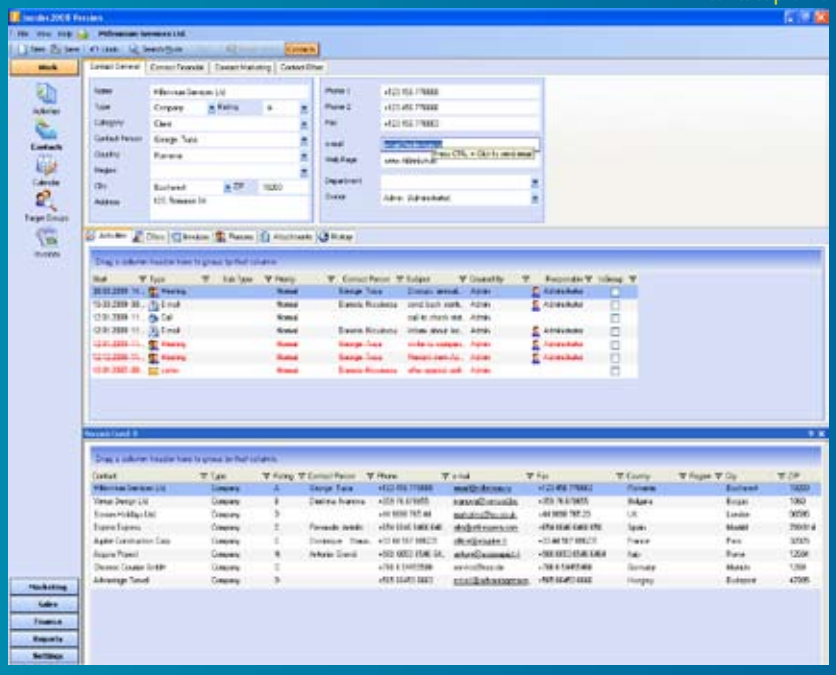
Insider will help you to get everything under control.

Contact management is the core and most important part of Insider. The system provides a complete customer view with all active contact's data - from initial contact to the post-sales service and support. Data can be found easily and tracked down quickly in a single location.

CONTACT PROFILE

- General information - contact name, type, rating, address, phone and fax numbers, e-mail, etc.
- Financial information - invoicing data, bank details, credit limits, etc.
- Marketing information - information allowing better and accurate contact targeting: business area, source lead, number of employees, notes, etc.
- Additional information – user specific data fields
- Activities – lists all tasks, calls and meetings for the active contact. Here users can create new activities and apply different filters to the existing ones
- Offers – displays all offers sent to the active contact, their chances, status and result
- Invoices – information about all invoices and payments for the active contact
- Employees – lists all people associated with the active contact with their names, positions and contact information
- Attachments – different documents (e.g. company profile, correspondence, contracts, etc.) can be attached to the contact profile, either by storing files within the database or by giving the path to the document
- History – tracks the complete contact history – tasks, meetings, phone calls, offers, invoices, etc. All data, created in other modules, is added automatically.

contact profile



ADVANTAGES

- Data is stored and accessed through an integrated, single location
- Automatic update of contact profiles with data added or modified in other modules
- Intelligent "locked fields" function for faster input and search of similar contacts
- Customizable data fields
- Flexible search function
- Data grouping, filtering and export functionality
- Management of contact groups
- Internet connectivity

EFFECTIVE TIME AND TASK MANAGEMENT

TIME & TASK MANAGEMENT

You are overloaded with various tasks and your time is never enough?

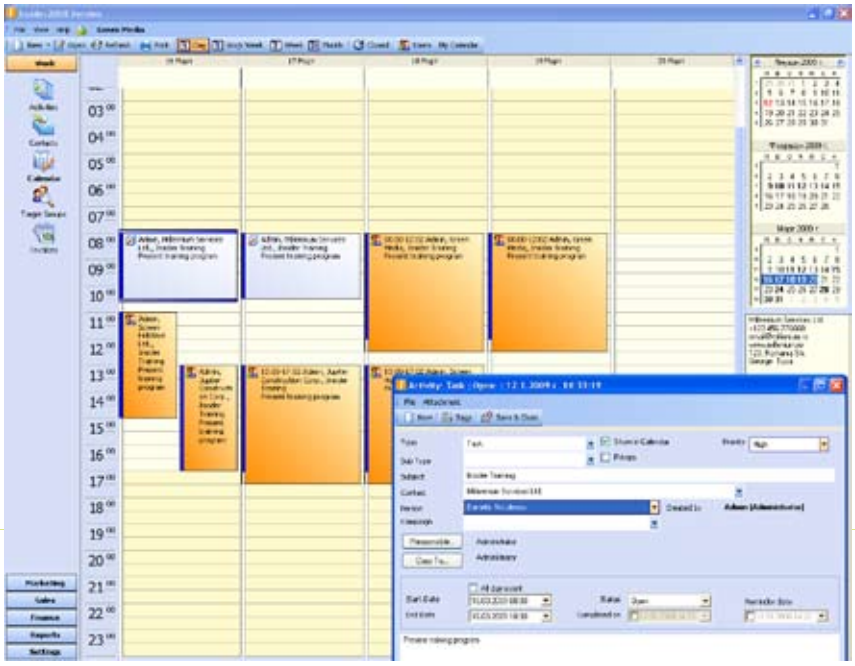
Insider helps you to manage your time and to prioritize your tasks more efficiently than ever.

The open task list is the first thing you will see each morning after logging into Insider. Group the tasks by task, priority, responsible person, etc.; take a look at the calendar and this will be your first step to a well-planned and managed working day.

ADVANTAGES

- Easy task creation and control
- Direct overview of open and high-priority tasks for better time management
- Direct access to the calendar and to task related contacts
- Task related attachments
- Simple generation if identical tasks for a group of contacts
- Task grouping, filtering and export functionality
- Task reminders
- Flexible reporting tools

calendar



MARKETING

The Marketing module manages all aspects of a campaign from assigning of administrative tasks such as printing of brochures to planning and completing of activities related to the targeted contacts such as sending invitations, receiving registrations, follow-up calls etc. Users can take advantage of the flexible search options in order to simplify the process of defining various target groups for a specific campaign. Each group can be modified at any time and can be used in multiple campaigns.

Furthermore users have the option to create and distribute automatically identical tasks to all contacts in a target group and to create a mailing directly from Insider.

ADVANTAGES

- Manages all administrative and financial aspects of marketing campaigns
- Fast and easy definition of target groups
- Automatic creation of multiple, identical tasks for campaign related target groups
- Direct mail merge in Microsoft word format
- Campaign related attachments
- Campaign result analysis

OPTIMIZED SALES PROCESS

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SALES & INVOICING

Wonder how to reach higher sales figures?
Focus on your customers and leads and leave the sales process management to Insider.

Insider will provide you with easy review of past and current account activities, standard offer and invoice templates, a built-in product catalogue and convenient analysis tools.

ADVANTAGES

- Complete contact, sales and payment history
- Built-in product catalogue
- Easy preparation and printout of standard offers
- Predefined intro and conclusion texts
- Multiple-option-offers
- Easy invoicing and payment control
- Automatic reminders for overdue payments
- Flexible reporting tools
- Options for additional offers and invoices customization

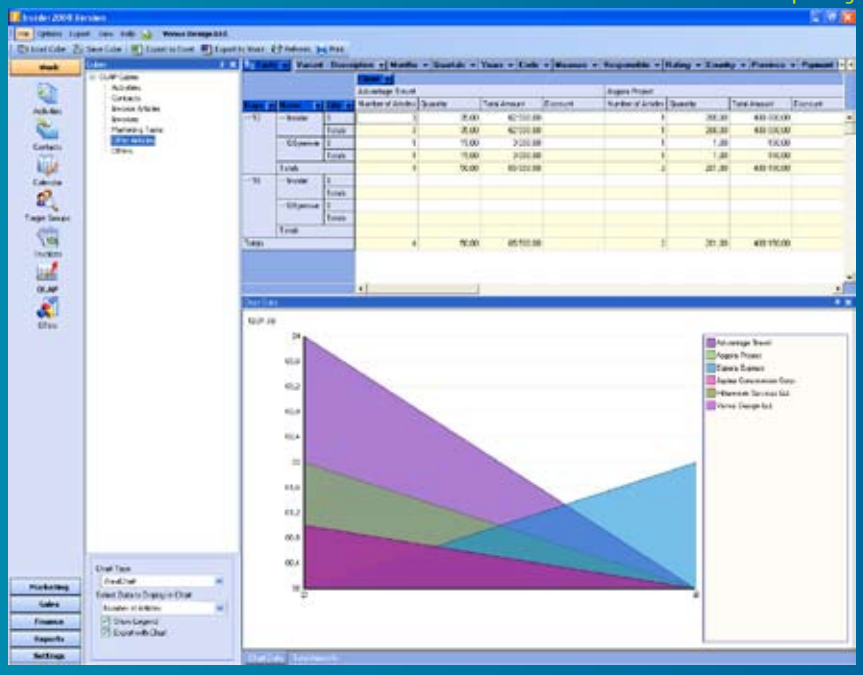
Offers can be created directly in the contact profile or in the Sales module. All contact and product data are filled in automatically but can be modified at any time. Free input of products and services not included into the catalogue is also possible.

Each offer can have more than one option e.g. with different items and discounts. In addition the built-in catalogue supports multiple prices for each item or service - e.g. dealer prices, end-client prices etc. Finally, offers can be printed right away using the standard print preview or exported to a Microsoft Word® document, where they can be additionally customized.

The Invoicing module allows easy and consistent invoicing and improved payment control through automatic alerts for overdue payments.

REPORTING

reporting



ADVANTAGES

- The OLAP reporting module is a handy tool for in depth and comprehensive database analysis and complete overview of company operation.
- Insider provides pre-defined OLAP cubes such as: Activities, Offered Items, Invoiced Items etc.
- All reports generated in the cubes can be visualized into various diagrams and charts as well as exported into Microsoft Excel, Microsoft Word and HTML formats.

INTEGRATED CRM & OFFICE MANAGEMENT SOLUTION

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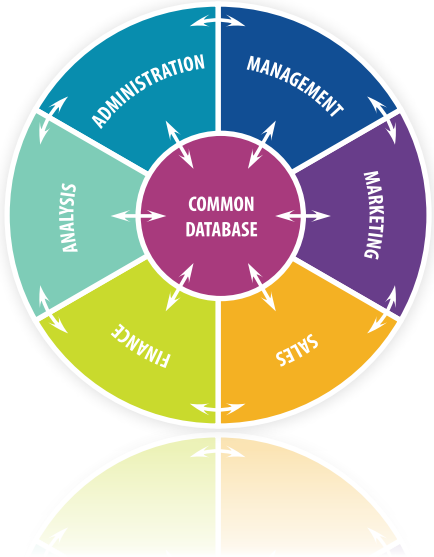
PRODUCT OVERVIEW

Insider is a fully integrated software solution providing tools for management of the overall client relationship management process - starting from lead database creation through effective marketing action planning to offering, invoicing and post-sales service.

Insider optimizes, controls and streamlines workflow processes in administrative, marketing, sales and finance departments of small and medium-sized companies.



- Effective client relationship management
- Optimal task and project planning and control
- Marketing campaigns design and implementation
- Full sales cycle and payment control
- Extensive reporting

ADVANTAGES

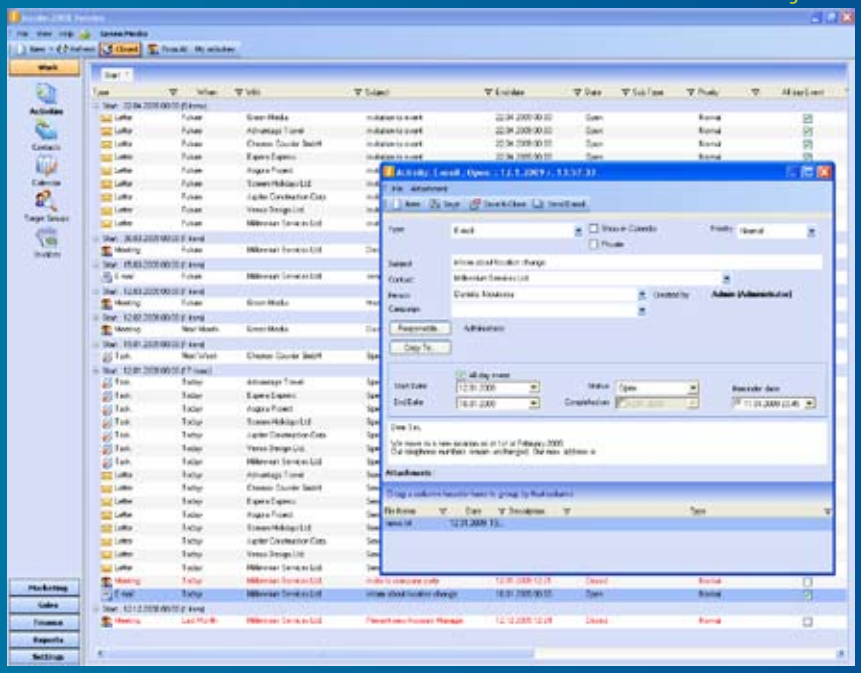
- Data is stored and accessed through an integrated, single application
- Easy to learn and use, transparent TCO
- Fully capable of data grouping, filtering and export
- Easy-to-use context menus, user-friendly interface
- Various customization options
- Multilingual interface
- Internet connectivity
- Remote access capability through the use of FTP or VPN
- Versatile access levels and control

SYSTEM REQUIREMENTS

- Minimum Hardware requirements
  CPU: 1GHz
  RAM: 512 MB
  HDD: 1 GB
  Video: 800x600

- Software Requirements:
  Operation System:
  Windows XP
  Windows Vista

task management



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- Insider is a fully integrated CRM solution for small and medium sized companies.
- Insider is a powerful office management system for task and contact management, marketing, sales and invoicing.
- Insider is easy to learn and much less expensive than similar solutions.
- Insider has no hidden implementation costs and needs no extensive training.

IRM Ltd. was founded in 2001 in Sofia, Bulgaria and has a partner network in Bulgaria, Greece, Romania and Turkey.

In 2003 IRM launched Insider - the integrated CRM and office management solution for small and medium sized companies.

In addition to its extensive consulting services the company offers professional product trainings and 24-hour-hotline.

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