RuleDesigner®

Collaborative portal for Sales

Relations management
along the customer lifecycle

RuleDesigner® offers a web environment for the management of Marketing and Sales workflows. The sales department can manage both new contacts and its own customer base through extended informative dashboards containing classification and relational data, documents, contacts and all related activities.

Tasks are planned thanks to agenda and personal planners and all customer information are stored in a dashboard that is really easy to consult. RuleDesigner® is ideal for those companies producing really complex products because it supports them in the generation of sales offers

Sales management can be combined with RuleDesigner® Configurator, thus making it possible for the sales department to acquire information about customer requirements and product specifications, without asking information to the technical department while issuing the order.

Generate sales contacts
with integrated marketing tools

Marketing campaign management

The marketing management environment allows to create and schedule corporate campaigns. All information related to marketing campaigns are stored and available in an informative panel: content, recipients, feedback, opportunities, activities and statistics.

Caonfigurable campaign type

Marketing campaigns typology can be configured according to specific needs and purposes. Once configured, they enable to manage every kind of marketing campaign: emails, events, fairs, sales promotions, telemarketing, surveys and so on.

Customer Relationship Management

Tools for managing customers data and for importing new contacts. This module is also provided with dynamic informative dashboards of each company with the possibility to add contacts and departments they belong to.

Company informative panel

The company informative panel contains all data and information about the company, including contacts and related activities. All this data can be easily consulted. For each company it is possible to track both classification and relational data. As a matter of fact users can define specific relationship networks between companies (group leader, suppliers, partners, customers, business groups) and can specify for each contact the position held inside the company. Through this panel other information can be consulted, such as scheduled and performed activities, documents, purchased products, offers and orders, helpdesk tickets

Advanced searches

Information can be easily retrieved through advanced searches in the contact databases by applying filters and dynamic attributes and by saving then all outputs obtained. Information can be also acquired thanks to cross-sectional searches using tools such as company or contact panels or with specific myhome gadgets. Searches can be saved, bookmarks can be defined and certain operations can be run on the outputs obtained.

Content management

Administration tools allow to publish independently contents using company templates, everything in real time. Managing workflows means creating and updating contents, setting approval rules, defining how long contents can be seen and storing all previous and current contents in one single repository.

Content publishing

Data from Web Services (News, Feed, Reader..) can be published and informative panels can be structured in configurable gadgets (widget).

RuleDesigner®

Manage customer relationships
by tracking exchanged communication

Informative portals and dashboards

Tools for creating reserved areas for customers, suppliers and partners with several detailed information that can be consulted only by certain users or groups on account basis.

Automatically tracking of web leads

Leads are managed by tracking web sites traffic and visitors. Through specific tools it is also possible to generate statistics about accesses to specific contents. Moreover, feedbacks of marketing campaigns can be automatically stored in the related campaign dashboard and linked to the related company. Dynamic data and information panels make the relationship between companies and stakeholder easier.

Activities, Agendas and Planners

Tools for planning tasks with workflows and dynamic and configurable typologies, personal agenda containing daily, weekly or monthly previews and global planners of company activities. Thanks to myhome gadgets users can receive and have an overview of all assigned activities.

Sales opportunities and Forecast

Sales opportunities together with progress status workflows and connected activities can be structured through specific tools. Each salesman has the possibility to monitor his own activities and track all phases of a business negotiation including chances of winning, competitor products or companies and checklists. Among these tools there are also forecasting tools with a list of all ongoing negotiations and permissions set on the basis of the position users have in the company..

Offers and Order management

Tools for generating business offers by managing their configurable approval workflows and versioning. Offers can be even automatically tracked and stored in the right company panel and exported in different formats like PDF or Excel. Once offers are approved, they turn into purchasing orders following a specific workflow until the fulfillment.

Contacts and Documents storage

Integrated module for document management supporting a structured creation, update and storage of files in the right company repository. Furthermore any kind of documents can be linked to the related company, thus tracking both the history of relationships with customers and shared documents.

MyHome with thematic gadget

Each salesman can configure his own myhome thanks to configurable gadgets. This way it is possible for salesmen to quickly and easily consult all information useful to carry out their activities, such as planned and received tasks, assigned leads and ongoing opportunities, issued offers or orders to be fulfilled.

Schedule your daily activities

and check your performances

Automatically e-mail storage

One of the main aspects of tracking information is linked to mail management. As a matter of fact the most important communication and exchange of documents take place via mail. RuleDesigner is able to track and intercept all sent/received emails, to check their content and to store them in the right company panel, connecting them to the right persons or projects and making sure that users don't need to do it manually. Furthermore, there is no need to change mail server (like Lotus, QMail,..) nor client (like Outlook, Thunderbird,). RuleDesigner Mail tools can be used together with the module for the management of projects in order to intercept, analyze and automatically store all mails in the right project file.

Multilingual CRM portal

Gestione multilingua che permette agli utenti di utilizzare gli strumenti in modo profilato.

Sales offers configuration

While collecting the customer's specifications salesmen can verify the feasibility of the configuration required, provide an estimation of delivery time and issue a quotation thanks to configuration tools directly available in the offer management web platform.
Salesmen can run the configuration process online (both in remote mode with an internet connection and off-line) being driven to the right selection of product specifications, thus obtaining a formally correct configuration
.

Configured offers tracking

It is possible to obtain all sales documents in real time, including quotations on the basis of product specifications, product sheets and any kind of information related to the product. The offer is automatically tracked and stored in the company platform and follows its own approval workflow until the order fulfillment.

Performace dashboard

A set of tools for configuring dashboards with statistics, graphics and concise data is available. These tools help monitoring sales performances and enable managers and sales directors to immediately check on the sales pipeline with the possibility to consult all data in real time. All these information are useful for salesmen to take effective decisions and achieve strategic objectives, monitoring the entire business performances for each business unit or for individual salesperson.

Queries, Extractions and reports

Tools for creating and saving queries with the possibility to have a graphical representation of data and to extract them in configurable reports (PDF, HTML, Excel format).