

The way to **manage** your customer relations...

Shireburn Business Tracker



In today's fast changing business landscape, it is essential that your organisation is able to effectively manage its relationships with all its clients, prospective clients, suppliers and other trading partners. The

Shireburn Business Tracker is an invaluable tool to leverage these relationships broadly across the business, centrally keeping tracking of all contact details, correspondence and activities between all your staff and your partners in one place.

Rather than relying on silos of information in people's mail files, the Business Tracker opens up all details of relationships and allows teams to collaborate more effectively.

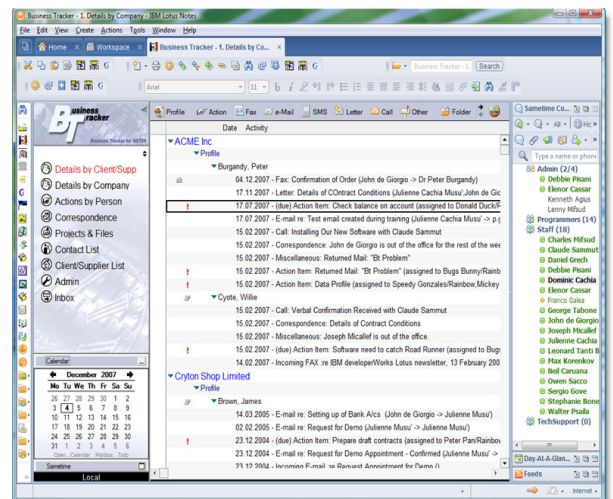
Correspondence

In the absence of a solution such as the Business Tracker, staff will correspond with their clients and suppliers mainly using e-mail, with some fax and letters, and will be copying other staff that need to be included in the trail and storing their correspondence in folders by client or subject matter. This usually leads to additional e-mail traffic and the inaccessibility to information when staff or not in the office or have left the company.

The Business Tracker on the other hand allows the creation of all correspondence directly below the client inside the Business Tracker where, assuming it is not confidential, all the in and outgoing correspondence with that client generated by all staff is recorded, providing a historical record of all interactions with that client.

The Business Tracker supports the creation and recording of e-mails, letters, faxes, SMSs, Word, Excel and PowerPoint documents, scanned in

correspondence, meeting/visit reports, call reports and any other type of attachments including recordings, videos, photographs etc. The SMS and Fax capability requires implementation of an additional module. Rather than creating e-mails from your e-mail software, searching for the e-mail address, a user highlights the contact and clicks on the e-mail button to create the outgoing e-mail which contains all the same functionality of the e-mail software.



Incoming e-mails will continue to be addressed to the individual who will then be able to record these in the Business Tracker from where they will respond. Confidential documents can be tagged as only being visible to certain users or groups so as to maintain their confidentiality.

In addition to being able to see all correspondence related to each contact within a client or supplier, the Business tracker also provides a company wide view of correspondence as well as a view by date showing all in and outgoing correspondence for each day. This allows a quick overview of the interactions to be provided.

Activity Tracking

One of the most time consuming aspects for many businesses is the assignment of activities and tasks to staff and monitoring of the status of these activities. Staff notify each other of these tasks typically by e-mail or word of mouth and may manage these tasks through the To-Do list in their e-mail.

The Business Tracker allows the creation of Action Items which describe the task at hand and are assigned to individuals. Activities undertaken relating to the action by various staff are able to be recorded allowing all participants to be aware of the current status. Views are available of outstanding actions by assignee, by company, by type and by follow-up date. A daily reminder can be sent to each staff member showing the outstanding actions which are set for follow-up.

Changes to Action Items, updates to the status of each action and comments made by users are made indelibly on the action. Team members are able to identify the history of the action and take over from other team members. Handovers are made much easier. Increase the responsiveness of your organisation with the Business Tracker.

Project Focus

Many organisations generate correspondence and activities related to specific projects, assignments or files. All correspondence with any party as well as activities are able to be tagged as relating to one or more projects, allowing a view by Project to enable oversight of the activities and

“With the explosion of corporate email facilities and the advent of multi channel communications, we had to look at our systems to ensure we were able to communicate effectively internally and be able to deliver robust business applications throughout the Bank.

We looked to Shireburn because of their products, their install base and their reputation in the market. Shireburn always comes back with a positive response to our queries and requests.”

*Victor Denaro – Executive Head, IT
Bank of Valletta plc*

correspondence related to each project.

Searching

Search for information in the Business Tracker using powerful full-text search capabilities across all documents and attachments. Ever tried remembering what was agreed with a client on a specific project or needed to refer to some correspondence created by a missing colleague and stored on their workstation? These are things of the past with the Business Tracker.

Contact Information

Use the contact information contained in the Business Tracker for creating mail merge letters, e-mail mail shots and labels utilising the same information source.

Integration with other applications

Create and store Microsoft Word, Excel and PowerPoint documents directly into the Business Tracker.

The Business Tracker fully supports electronic scanning of incoming correspondence and document imaging is built into the Shireburn Business Tracker as well as the ability to receive and store faxes electronically.

Mobility

Multiple encrypted copies of the Business Tracker database can be located on different sites as well as authorised user's laptops enabling access to all contacts, correspondence and activities while travelling or working from home. This technology enables you to exploit the potential of teleworking to maximise flexibility for company executives and employees.

Requirements

The Business Tracker requires the implementation of IBM Lotus Notes and Lotus Domino version 6.0 and above.



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