

Be close to your customer...



Financial Brokerage Edition

On demand CRM.....any time & everywhere

netEasy CRM

Financial Brokerage Edition

"When knowing your customer is your business."

Product Information

netEasyCRM is a complete client profiling software solution enabling your business to be customer focused and proactive in caring for your clients.

Specially developed for small business, you get many of the advanced functions of enterprise solutions without the costs and complexity.

netEasyCRM business solution line of products are specifically designed to create a knowledge base and build your business' momentum by leveraging that knowledge

Benefits

netEasyCRM, brings with it substantial business benefit. You can build and leverage client information, prospects, sales, interactions from anywhere, any time.

Increased Sales

Your sales will increase with customer centric profiling. Unique personal "network" modeling turns name dropping into leads and sales. With detailed customer profiles, identifying and targeting for cross selling and additional offers becomes a simple task. Because "back office" functions are covered in netEasyCRM your clients receive the highest level of service. A happy client is, after all, your best salesman. Watch referral sales climb as your clients experience the care that you can provide with netEasyCRM

Increased Retention

While new sales are important, it is a well known fact that selling to an existing client is much less costly than acquiring new clients. netEasyCRM knows how to take care of those clients that you worked so hard to earn. With reminders and other post sales services, you will never lose another customer due lack of service. Grow your customer loyalty and grow your profits.

Simplicity of Use

netEasyCRM was developed "in the field" in partnership with real world companies. A familiar windows explorer design with powerful searching and cross linking ensures that your staff spends the minimum effort to get the maximum benefit.

Available

It looks like windows, but it acts like web! netEasyCRM leverages the latest Web Services technology to connect you to the central database using the internet. Anywhere you can connect to the internet, you can use netEasyCRM. No need for VPN or other special leased lines.

Expandable & Customizable

netEasyCRM Financial edition can be customized for your business. The modular design makes adding new functionality possible. We know that all businesses are not identical. For a perfect balance between "buy or Build" our development team is standing by to tailor netEasyCRM to your specific needs.

The Company

TheDevShop Ltd. is a software company producing custom software solutions.

*The DevShop Ltd.
22/6 Emporium Tower
622 Sukhumvit Rd
Bangkok, Thailand. 10110
+66 (0)2 664-7252, +66 (0)2 664-7253
sales@thedevshop.com, www.TheDevShop.com*

Be close to your customer...



Financial Brokerage Edition

On demand CRM.....any time & everywhere

Features

Customer Database

Store your customer names, nationality, birthdays, occupation, marital status, addresses, earnings, e-mail addresses, employers, payment information, sales cycle status and much more. Powerful searching allows you to find customers using even the smallest piece of information from partial names, to e-mail address, to telephone number, you can locate your customer with ease.

Relationship Networks

Your customers are not alone, they exist in a real world. Each customer has relationships with other people through a relationship network. netEasyCRM allows you to record relationships between customers, employers, friends, co-workers or otherwise. With netEasyCRM relationships, your sales team can use relationships to leverage "network" sales and grow your knowledge of your client in multiple dimensions. You can even "promote" network contacts to be prospect customers.

Interactions

You deal with your customer in many ways, e-mails, sales calls, phone calls, mailings and more. netEasyCRM allows you to track all the interactions between you and your customer. With netEasyCRM you have full context and continuity when dealing with your customers. You can even schedule future interactions to ensure that you don't forget to make that follow up call.

Alerts & Reminders

You may not remember every person that you promised to contact, but netEasyCRM does. You can add in reminders to contact clients, next week, next month even next year, and netEasyCRM will remind you with an alert when the time comes.

Groups

You can create groups at any time for any reason. Use groups to track special clients, target in marketing campaigns, or just to organize your customers in ways that are unique to your business. E-Mail entire groups with the press of a button.

Employees

Your customers often relate to individuals within your organization. This may be sales, service, administration or accounting. netEasyCRM allows you to add in your staff to its knowledge base. You can know exactly who you client has interacted with by building interactions with your staff.

Profiling

netEasyCRM has a unique user definable customer profiling system that lets you profile your customer in ways that are unique to your business. It works by defining a question and a set of available answers in netEasyCRM. You can then record your customer's answer from the available set. Sound complicated? Not at all, let's look at an example. Let's say you want to collect information on your customer's smoking habit. Just add in the question "Do you Smoke?" and possible answers "Yes", "No". Now you are able to capture the response for each client. Since the questions are defined by you, the possibilities are limitless. Some examples may be: sports preferences, food preferences, language preference, Educational level... it's all possible.

Document E-Filing

netEasyCRM creates a file folder for each customer. You can add in any type of electronic document, from office documents to scans of paper documents, you can file any number of documents in your client's folder. No need to search hard disks, emails, and piles of paper it can all be on-line all the time. Available from anywhere.

Be close to your customer...



Financial Brokerage Edition

On demand CRM.....any time & everywhere

Organizations

Not all customers are people, some are companies and organizations. In addition people work for organizations. netEasyCRM tracks organizations in two ways as a customer, also as a work place in which your customers work.

Locations

Where are your clients? netEasyCRM intelligent locations module automatically places your customers into country and city files based on their address information. You can see right on your screen all clients in any city you choose. Making a sales call to a certain city? Optimize your travel dollar by contacting others customers in the same city.

Reporting

With netEasyCRM all information is on-line and at your fingertips. In addition to the on-line information you will also find a set of informative reports to help manage your business and your clients. Print client profiles, lists by location or group. Report on interactions, recently updates, client sales status, staff interactions and more. Over 80 predefined reports ensure that you have the information you need, when you need it.

Financial Brokerage Module

We know of no other CRM software that is specifically designed for the Financial Brokerage Industry.

Requirements

- netEasyCRM Client runs in Windows 98, 2000, Me, XP, NT(4.0).
- Internet connection.
- netEasyCRM server requires windows server NT4 to 2003, MS SQL Server 7.0 or higher, IIS server.