

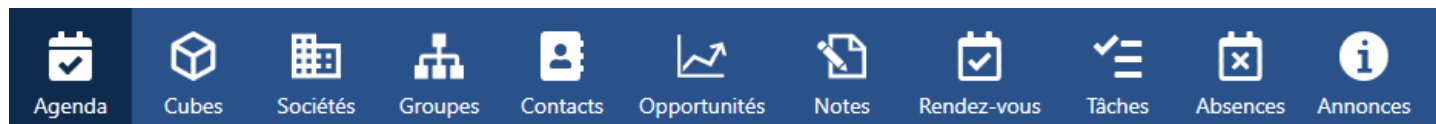
ReflexClient CRM

ReflexClient CRM® is a Customer Relationship Management software **integrated and synchronized** with VoluPack / VoluPrim to **ensure data consistency** between your CRM and ERP.

ReflexClient CRM® manages companies, groups, contacts, sales opportunities and actions.

Mobile by nature, ReflexClient CRM® accompanies sales representatives on their travels and **syncs automatically with the server** to protect data integrity.

Sales representatives rely on "cubes" to analyse their customer's estimates, orders and invoices, even while travelling and without Internet access.



The Agenda

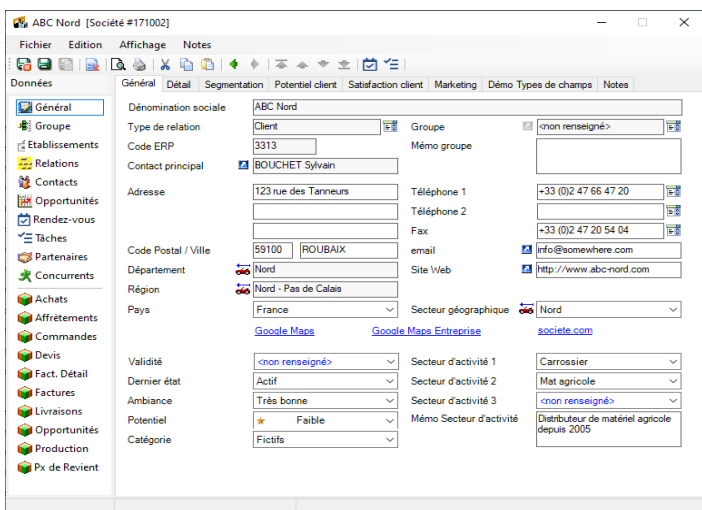
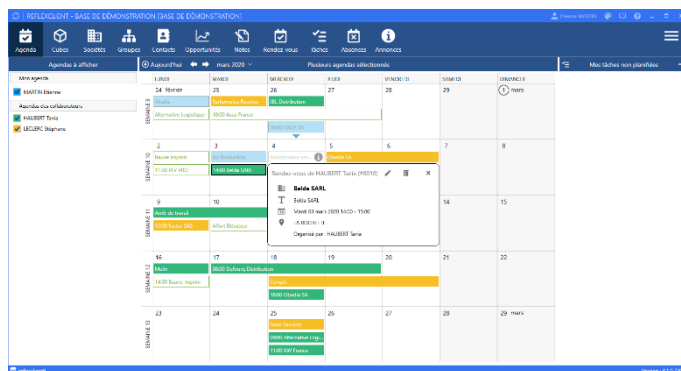
Fully integrated in ReflexClient, the agenda gives you access to all events added to your CRM solution.

It syncs with your Microsoft Outlook and Google Calendar agendas.

A simple click brings up detailed information about an event (for example the time and location of an appointment), and indicators inform you about the tasks that are due to expire.

The administrator can allow users to access their own agenda as well as their co-worker's.

The Agenda view includes a panel listing the unscheduled tasks that users can add to/delete from their calendar with a simple drag and drop.



The Companies

ReflexClient CRM® helps you manage

- ▶ suspects, prospects, customers
- ▶ suppliers, partners, competitors

Many categorisation options (atmosphere, potential, business line, ...) assist users in their work.

Customisable tabs can be added to manage new types of information which were not initially available.

Notes can be entered as structured text to exchange information between co-workers.

These notes can include documents (Word, Excel, emails) or links to documents.

Input assistance is available to enter cities, zip codes and phone numbers.

Company records give access to optional cubes offering an analysis of your CRM data for the current company.

The Groups

ReflexClient CRM® supports company groups.

Companies can be accessed instantly and smooth navigation allows to switch easily between the companies in each group.

A capital ownership graph can be displayed (for subsidiaries).

A single click allows you to display all the contacts attached to the various companies of the group.

Nom	Titre	Société	Téléphone 1	Portable	Email
Stanford Groupe	ACHETEUR	Non renseigné	+33 (0)3 38 88 31 37		Raphael.ALIX@example.com
Sephora France	Directeur des achats	Sephora France			Sophie.ALLIX@example.com
Electro-Mat	Gérant	Client	+33 (0)1 21 28 54 83		Sebastien.AUBERT@example.com
RBO Industries	Directeur commercial	Client	+33 (0)3 07 04 80 39		Aurélia.AUBERT@example.com
Parfums Air du Temps	Agent des méthodes	Client	+33 (0)3 22 96 41 84		Chaire.AURIL@example.com
TIB	Président directeur général	Client	+33 (0)3 38 26 63 27		Nathalie.BARBE@example.com
Domesto	Acheteur	Client	+33 (0)1 26 97 69 27		Laurent.BARREAU@example.com
Compoir d'Electricité Franco	Directeur marketing	Client	+33 (0)1 34 29 05 42		François.BARRET@example.com
Meca Precision	Directeur d'usine	Client	+33 (0)1 34 30 29 86		Mireille.BAUDET@example.com
Qualitelec	Gérant	Client	+33 (0)3 88 65 97 86		Clement.BAUDET@example.com
Delta Box	Acheteur	Client	+33 (0)1 04 09 87 64		Théa.BAZIN@example.com
Kinea-Co	Acheteur	Client	+33 (0)1 85 81 96 77		Martine.BERGEER@example.com
Toxe	Agent qualité	Client	+33 (0)3 17 75 14 39		Dominique.BERTHET@example.com
Baune Imprim	Agent des méthodes	Client	+33 (0)2 45 88 25 25		Victoria.BERTRAND@example.com
Dampert Vallon	Agent marketing	Client	+33 (0)1 96 36 29 46		Fabrice.BINET@example.com
Dival Casting	Acheteur	Client	+33 (0)3 91 15 54 38		Mathilde.BLUN@example.com
ROMANT Claire	Acheteur	Client	+33 (0)1 13 46 90 90		Claire.ROMAN@example.com
Kidapip	Responsable magasin	Client			Georges.BOSC@example.com
ABC Nord	Agent commercial	Client			Sylvain.BOUCHET@example.com
Carosserie Express	Directeur d'usine	Client	+33 (0)2 72 37 41 05		Gerard.BOUQUAY@example.com
Isover Saint Gobain	Acheteur	Client	+33 (0)3 30 60 83 95		Aurone.BOUQUAY@example.com
Casierne de Vanifroy	Acheteur	Client	+33 (0)1 92 21 56 11		Cecile.BOUQUET@example.com

The Contacts

Contacts are individuals attached to companies or facilities.

Like companies, contact records offer the ability to enter complementary information and notes.

What is more, the “smart” search function makes it possible to find a name using spelling approximations or phonetic spelling (also available for companies).

Search results are sorted by relevance, indicated by bars.

The Notes

Notes are a true medium of communication within your company, allowing the exchange of information between ReflexClient CRM® users.

Notes can be entered for companies, groups, contacts and opportunities.

You can enter notes in a conventional manner or you can drag and drop or insert attachments (Word or Excel documents, emails), without any retyping.

Date	Objet	Auteur	Destinataire
10/11/2009 11:10	MARTIN Etienne	MARTIN Etienne	Société
28/01/2020 17:02	MARTIN Etienne	MARTIN Etienne	Société
28/01/2020 17:02	MARTIN Etienne	MARTIN Etienne	Société
28/01/2020 17:02	MARTIN Etienne	MARTIN Etienne	Société
17/11/2009 12:46	MARTIN Etienne	MARTIN Etienne	Société
03/10/2008 15:10	MARTIN Etienne	MARTIN Etienne	Société
17/11/2009 15:17	MARTIN Etienne	MARTIN Etienne	Société
05/01/2007 17:12	MARTIN Etienne	MARTIN Etienne	Société
12/04/2007 15:08	MARTIN Etienne	MARTIN Etienne	Société
12/04/2007 14:48	MARTIN Etienne	MARTIN Etienne	Société
14/11/2008 11:53	MARTIN Etienne	MARTIN Etienne	Société
14/11/2008 11:53	MARTIN Etienne	MARTIN Etienne	Société
24/10/2008 16:26	MARTIN Etienne	MARTIN Etienne	Société

%	Etape de vente	Objet	Société	Montant	Mt pondéré	Etat
60 %	Signature	Vente campagne pub	Sephora France	250 000 €	150 000 €	Ouvert
55 %	Proposition	EMBALLAGE PARFUM LUXE	Sephora France	20 000 €	11 000 €	Ouvert
35 %	Visite	STOCKAGE PALETTES	Sephora France	38 400 €	13 440 €	Ouvert
10 %	Qualification	Gamme "MIRACLE"	Sephora France			Ouvert
10 %	Qualification	Vente suivi PF CAB	Sephora France			Ouvert
10 %	Proposition	Projet vente emballage nouveau par...	Sephora France			Ouvert
10 %	Qualification	vente CRM pour gestion ...	Sephora France			Ouvert

The Sales opportunities

Sales opportunities are portfolios of potential business for sales representatives.

Each sales opportunity includes a number of steps defined in custom scenarios.

At each sale step, the representative specifies how the total amount of the business case evolves and estimates the probability of success. He also indicates the expected signature horizon.

In the list, this estimate is shown with a graduated scale: the higher the number of bars, the higher the prospects of success.

The Appointments

ReflexClient offers a complete management of appointments within your company.

An appointment entered in ReflexClient will automatically sync with your desktop agenda and vice versa.

In addition to basic information such as the time and location of appointments, you can add attachments and link them to sales opportunities.

You can also send email invitations to attendees. Their answers will be presented as icons.

You can display appointments as lists or events in your agenda.

RENDEZ-VOUS

Cartonnages de la Rotonde (CartoBox)

Réunion CDLR

Autrech

Debut: mer, 06/05/2020 11:00

Fin: mer, 06/05/2020 12:00

Description: Compte-rendu

Organisateur: MARTIN Etienne (e.martin@volunte-software.com)

Participants: MARIN Antoine (antoine.marina@gmail.com), MOUREAU Marine (marie-moureau@gmail.com)

Synchronisation avec Google activée

Créé par	Affecté à	Type	Titre	Désignation sociale	Statut	Statut	Pris	In	Planifié le
MARTIN Etienne	MARTIN Etienne	<non renseigné>	Ass France	Ass France	Non commencé	1	mar.	25/02/2020	10:00
MARTIN Etienne	MARTIN Etienne	Appeler	PLV PRO	PLV PRO	Non commencé	2	lun.	02/03/2020	11:00
MARTIN Etienne	MARTIN Etienne	Etude	Baune Imprim	Baune Imprim	Non commencé	3	mar.	10/03/2020	
MARTIN Etienne	MARTIN Etienne	Prendre rendez-vous	Alfort Elevateur	Alfort Elevateur	Non commencé	3	mar.	10/03/2020	
MARTIN Etienne	MARTIN Etienne	Etude	Baune Imprim	Baune Imprim	Non commencé	3	lun.	16/03/2020	14:00
MARTIN Etienne	MARTIN Etienne	<non renseigné>	Valognes (SA)	Valognes (SA)	Non commencé	3	ven.	13/03/2020	09:00
MARTIN Etienne	MARTIN Etienne	Appeler	Alternative Logistique	Alternative Logistique	Non commencé	3	lun.	24/02/2020	

The Tasks

ReflexClient ensures the traceability of actions for sales representatives and employees.

You can monitor the following tasks: phone calls, postal mails, fax, emails, appointments, events, misc. tasks.

Each task is assigned with a priority level, a deadline and a state (to do, in progress, completed, aborted). Notes offer you the ability to enter observations, visit reports, ...

Tasks can be displayed as lists or as events in your agenda.

The Absences

ReflexClient offers users the opportunity to declare their absences.

Absences can be managed with public and/or private designations, the latter being only visible to the user who declared the absence.

This function allows each user to control the information he shares with the other users.

Absences are available as lists or as events in your agenda.

The Announcements

Announcements offer a convenient way to communicate messages to all users, for example to inform about a customer visit or an upcoming event of technical maintenance.

Like all events, announcements are can be displayed as lists as well as events in agendas.

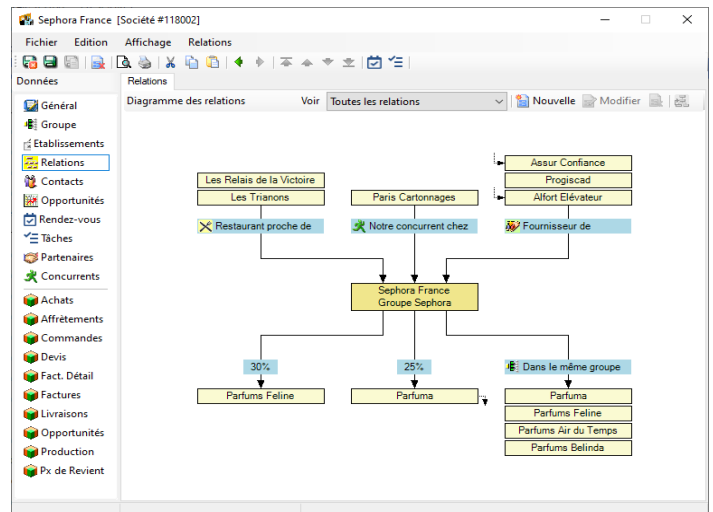
The Intercompany relationships

From a company record, you can see at a glance the ecosystem of your company:

- ▶ Group companies
- ▶ Subsidiaries (with percentage of capital ownership)
- ▶ The nearby companies (to optimise your travels)
- ▶ Your competitors and partners for this company
- ▶ This company's competitors, partners and suppliers
- ▶ The surrounding restaurants and hotels

A simple click allows you to navigate between companies.

You can also create your own types of relationship.



REFLEXCLIENT - BASE DE DÉMONSTRATION (BASE DE DÉMONSTRATION)

Agenda Cubes Sociétés Groupes Contacts Opportunités Notes Rendez-vous Tâches Absences Annonces

Modèles de listes + 110 - Mes opportunités en cours

110 - Mes opportunités en cours

Créer	Modifier	Supprimer	Favoris	Marquer comme lu	Excel	Filtres	Colonnes
ID	DM	Responsable	Dénomination sociale	Client	Etat	Seg	
100	10/12/2012	MARTIN Etienne	Sephora France	Vente campagne pub	Ouvert	337	
200	23/11/2012	MARTIN Etienne	Sephora France	Vente suivi PF CAB	Ouvert		
300	14/11/2012	MARTIN Etienne	Belta SARL	CABN	Ouvert		
310	13/11/2012	MARTIN Etienne	Sephora France	STOCKAGE PALETTES	Ouvert		
400	13/11/2012	MARTIN Etienne	Alfort Elevateur	CABN - Marché annuel	Ouvert		
410	13/11/2012	MARTIN Etienne	Aius France	Etude nouvel emballage écran	Ouvert		
	13/11/2012	MARTIN Etienne	Confiserie Glido	Etude emballage	Ouvert		
	13/11/2012	MARTIN Etienne	Electro-Mat	Etude stockage palette	Ouvert		
	13/11/2012	MARTIN Etienne	Imprimerie Jean-Claude Leloup	Casses spéciales	Ouvert		
	13/11/2012	MARTIN Etienne	Innovec	Etude nouvel emballage	Ouvert		
	13/11/2012	MARTIN Etienne	Lapierre	Caisse spéciales	Ouvert		
	13/11/2012	MARTIN Etienne	Prograd	CABN	Ouvert		
	13/11/2012	MARTIN Etienne	Transport du Marais	CABN	Ouvert		
	13/11/2012	MARTIN Etienne	Yves Rocher	Caisse lise	Ouvert		
	24/10/2012	MARTIN Etienne	Sephora France	Gamme "MIRACLE"	Ouvert		
	02/10/2012	MARTIN Etienne	Sephora France	EMBALLAGE PARFUM LUXE	Ouvert		
	08/08/2010	MARTIN Etienne	Alternative Logistique	Etude	Ouvert		
	18/10/2007	MARTIN Etienne	Sephora France	vente CRM pour gestion ...	Ouvert		
	27/02/2007	MARTIN Etienne	Sephora France	Projet vente emballage nouveau parfum	Ouvert		
	27/02/2007	MARTIN Etienne	PLV PRO	Suivi PLV CARTON	Ouvert		
	13/02/2007	MARTIN Etienne	ABC Nord	KOOCOC	Ouvert		
	14/02/2007	MARTIN Etienne	Thermal Services Leader	contrat annuel sur boîte toilette lise	Ouvert		
	05/01/2007	MARTIN Etienne	Alfort Elevateur	CATALOGUE FEVRIER 2007 - 3500 ex.	Ouvert	281	

ReflexClient 39 éléments trouvés Total records: 713 265 (pondéré) 418 295 (€) Sélection: 0 (pondéré) 0 (€) Version: 4.1.0.7188

The Custom lists

ReflexClient offer the ability to make fully configurable lists from companies, opportunities, actions, appointments, tasks, absences, announcements, notes.

List results can be exported to Microsoft Excel®.

For example, you can extract the data from a department or a business line to send a mailing to your customers thanks to the mailing function integrated with Microsoft Word®.

You can create as many mailing lists as you want, and leverage them for specific events (invitations, price modifications, ...).

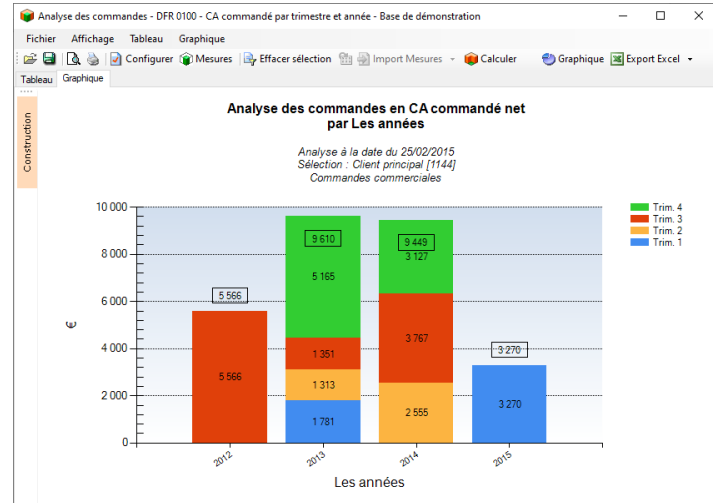
ReflexClient Cubes module

Integrated with ReflexClient CRM®, ReflexClient Cubes® modules provide users with key ERP data about invoices, orders, estimates, opportunities, cost price, purchases, production, charters, deliveries.

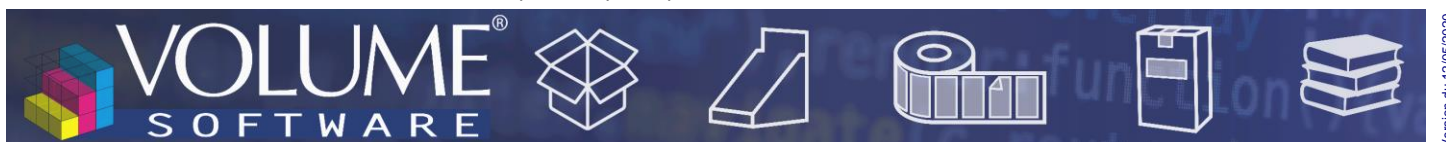
ReflexClient Cubes® allow IT laypersons to build data analysis and data mining tables in minutes.

This data is synced by a powerful differential engine and made available for roaming usage. Data remains reachable even when users are not connected to their enterprise network.

Modularity and security: sales representatives only access the data relating to their own customers.



Processeur 2 GHz - Windows 10 - RAM 4 à 8 Go - Espace disque disponible : 20 à 100 Go



<http://www.volume-software.com>
<http://www.reflexclient.com>

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