360° success with the update.CRM product modules:
Take full advantage of our technological innovations

» Our customers are **more successful.**

Product overview
update.CRM Add-ons
World-class CRM software should bend to meet the user’s specific needs, not vice-versa. update.CRM pursues this concept from start to finish as the best way to provide a long-term boost to your business. We offer a wide range of add-on products that can be combined flexibly to fit your precise requirements – and ultimately make your business processes flow more efficiently.

» Sustainable
» Flexible
» Easy to use
**Mobile CRM**

Because it is web-based and accessible using all standard browsers, update.CRM delivers flexible access to your customer data wherever you are. Work on the go has become part of the standard responsibilities for any field sales or field service team.

**CRM.pad**

**Your intuitive mobile CRM solution**

Developed specially for the Apple iPad, this native app combines the benefits of your familiar CRM solution with the iPad's intuitive user-friendliness. Take full and efficient advantage of your CRM database while away from your office or workstation. Whether you are working online or offline, all important customer information is perpetually at hand. The app accesses update.CRM and its processes directly so that you can manage customer data, contacts, leads, tasks and orders. You can review all appointments or open tasks and customer addresses on an interactive street map. This saves you time while organizing your work day more efficiently.

**CRM.mobile**

**Compact CRM app for your smart phone**

Optimized for smart phones, CRM.mobile is the ideal app for CRM on the go. Field sales and service teams can access all the relevant information wherever they are, with just a few taps. With online access to your CRM data, you can quickly and easily look up customer data and contact details, initiate calls directly in the app, plan and document activities, check your opportunities and add leads in real time. The browser-based web application supports all common operating systems and a broad range of smart phones, allowing you to choose the device that best meets your needs.
CRM Integration
Integrating your CRM system into your existing IT landscape provides you with a comprehensive view of all customer data and optimizes your business processes. Thanks to its numerous interface options, update.CRM ensures that the data you need is in the right place at the right time, streamlining your company’s workflows.

CRM.interface
Simple data transfer via XML
CRM.interface includes a bi-directional XML interface for simple synchronization of data between update.CRM and other applications. This improves the speed and efficiency of data transfers and process transactions. Because CRM.interface supports multiple applications at once, the software makes it possible to synchronize multiple corporate solutions in real-time. The online transfer process features integrated troubleshooting, thus eliminating many potential sources of error, including duplicates, from the start. Not only will the collected data be of better quality, CRM.interface also guarantees that you are presented with the most up-to-date customer information while it works in the background to keep all databases consistent and all processes integrated across the system – even for „always online“ scenarios.

CRM.webservices
Powerful system interfaces
CRM.webservices is designed to deliver a broad range of powerful web services and administrative tools. When combined with open, platform-independent industry standards like SOAP (Simple Object Access Protocol) and HTTP (Hypertext Transfer Protocol), this helps cut development times for interfaces and improves compatibility with third-party systems. Using CRM.webservices means sending your CRM data wherever it is currently needed – and receiving it back safely.
CRM.phone
Seamless telephone integration
CRM.phone automatically links all telephone activity to your CRM processes. Using caller ID, a direct connection to the latest customer information is established; that data can be viewed or edited during the phone call. CRM.phone supports integrated telephone number search, redialing, and inbound and outbound calls. The result is customer support within a single system and more efficient handling of all telephone conversations. The software also facilitates telemarketing and telephone campaigns. Link update.CRM to an existing CTI (Computer Telephony Integration) system to further streamline your sales, marketing and service workflows.

CRM.connector
Appointment, calendar and e-mail synchronization
One core prerequisite to reaping the full benefits of CRM software is the establishment of company-wide documentation of customer contacts. CRM.connector allows you to synchronize appointments, e-mails, personal contacts, tasks and out-of-office notices from Microsoft Outlook and Lotus Notes directly with update.CRM. This is crucial because not all Outlook or Lotus Notes users in your company will necessarily be update.CRM users. CRM.connector thus provides an easy way to integrate all employees in the CRM process by delivering valuable, up-to-date customer information. The synchronization process runs automatically in the background with no user interaction required, and can be configured to fit individual users’ needs. With both systems reliably synchronized, you can be confident that the most up-to-date customer information is always at hand.

CRM.connectLive
CRM Information directly in Microsoft Outlook
The Outlook plug-in CRM.connectLive delivers up-to-date contact and sales data concerning your customers directly to your e-mail program, simply and conveniently without any need for you to switch over to the CRM application. As soon as an e-mail is received, CRM.connectLive uses the e-mail address of the incoming message to identify its sender. When you select a message, the plug-in opens a separate Outlook window displaying all information stored in the CRM system for that person. This includes contact data, sales data and opportunities. This gives users not working with update.CRM the chance to take advantage of current CRM information. You benefit from the use of trusted tools, even as you optimize internal communication paths and save valuable time.
Analytical CRM
The true power of the update.CRM concept emerges once you start analyzing the data collected in the CRM system. Integrated functions allow you to conveniently perform analyses directly in the CRM application. Quick, targeted analyses and reports based on your CRM data promote the kind of objective decisions that foster long-term success.

CRM.intelligence
Analytical CRM in a SaaS environment
Get the most out of your customer data and identify patterns within your CRM data using CRM.intelligence. QlikTech's business intelligence solution accesses existing update.CRM records and calculates KPI based on the data. For targeted analyses, select one of the numerous charts and graphs, set the system to process the raw data and then organize the results into complex analyses at the click of a button. In just a few clicks you can obtain an overview of the structure, situation and trends within your field of activity. Harness these new insights, including cull rates from customer interactions, into planning your future activities and controlling operative procedures.
CRM Administration

No two CRM projects are alike. The trick is to get a clear handle on the scope and details of a specific project so that it can be tailored to serve individual users’ needs. Documentation and process descriptions – comprehensible, detailed and up-to-date – are needed for your CRM application and its add-ons so that you can maintain a proper overview of the system and keep costs and complexity low.

CRM.cockpit

Centralized documentation & configuration

The ability to continue improving your CRM software and adapt it optimally to your company’s changing needs can make the difference between the success and failure of your CRM project. Detailed documentation of system modifications and adaptations are crucial for keeping the entire project team up to date. CRM.cockpit lets you manage and document company-specific processes and configurations centrally. Descriptions of processes and relationships are generated at the click of a button in various formats (PDF, HTML or Word documents). This allows you to deploy customizations to your project quickly and without misunderstandings. CRM.cockpit lets you implement your CRM strategy quickly, affordably and with complete flexibility.
About the company

update software AG

With more than 200,000 users in more than 1,600 companies, update software AG (www.update.com) is one of the leading European providers of customer relationship management (CRM) software. update software AG is based in Vienna, with subsidiaries in Germany, Switzerland, the Netherlands, France and Poland. The company is also represented across Europe through a network of established partners.

update has been listed on the German stock exchange in Frankfurt am Main since 2000. update software AG has borne its current name since May 2002, and Thomas Deutschmann has been the Chief Executive Officer (CEO) of the company since November 2002. His colleagues on the Executive Board are Arno Huber as Chief Technology Officer (CTO) and Uwe Reumuth as Chief Financial Officer (CFO).

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