

365 Chemical



Chemical365

The Chemical365 product offers companies in the chemical industry comprehensive solutions that make everyday work easier and more efficient. Based on Microsoft Dynamics CRM & ERP, the Chemical365 product accompanies you from acquisition to quotation creation, from commissioning to maintenance through the entire value creation process. The solution is fully integrated into Outlook and can be seamlessly connected to other systems. Our team of experts ensures quick and uncomplicated implementation into your existing system landscape and accompanies you into the world of Industry 4.0 and Internet of Things.

Chemical365 core features

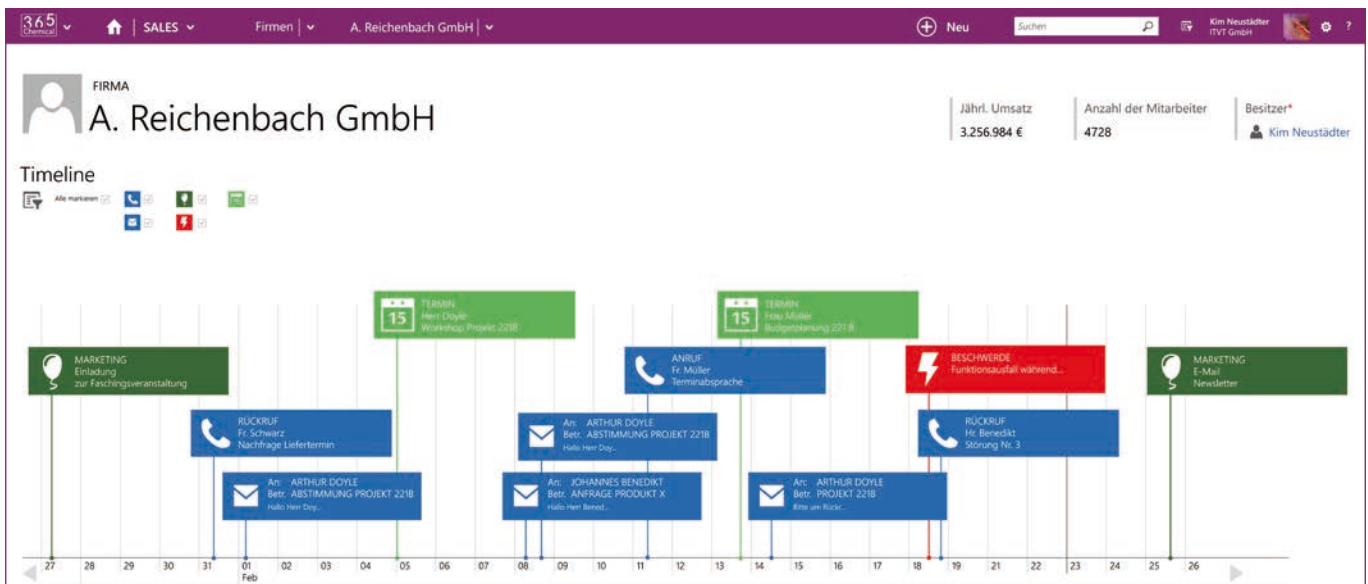
- › Project and service sales
Support in the offer process and follow-up
- › Analysis of potential (100% list) and Needs of current and potential customers
- › Recording customer contacts as visit reports (Visit Report) with structured content and evaluations
- › Packaged and unpackaged goods, products, materials alien and product hierarchies
- › Production facilities and capacities
- › Timeline – all important CRM information of your customer at a glance
- › 360° customer sheet – compressed 360° view on your customers
- › The quick processing and process mask combined the most important basic processes of the system in one interface
- › Sales opportunity assessment (questionnaire). a standardized matrix
- › Advanced document creation with management
Text modules and attachments
ERP linker – context-related jumps into internal systems (SAP, NAV, etc.) and Internet applications (Bing, Bing Maps, etc.)
- › Interface module – Seamless integration with SAP, Microsoft Dynamics 365 Finance, Operations, Business Central, Marketing, Sales, Commerce, HR, Service, etc.
- › Master data management –
Synchronization of master data in Your company, taking critical fields into account (including clearing process)
- › Approval process for application and Implementation of releases
- › Sales area assignment based on Countries, zip codes or other criteria
- › Pattern Management
- › Sample shipping with DHL tracking
- › Marketing campaigns and activities

The customer is the focus – especially in your CRM system. All of the customer's important information is presented to you in a clear 360° view. You have access to sales and marketing activities, as well as service data and information from connected systems.

The quick processing and process mask offers you a comprehensive search with the option of controlling the central processes directly from the mask. All interactions with the business partner are presented to you chronologically via a timeline.

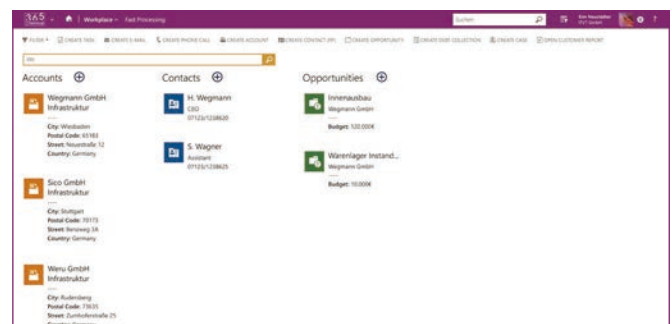
timeline

The ITVT Timeline can be flexibly configured so that sales or marketing information can be displayed depending on your business area, e.g. B. when a customer meeting took place and when an offer was sent. The timeline can also be integrated directly into the sales opportunity, inquiry or production facility.



Fast processing

Operate and use your Microsoft Dynamics 365 via a single interface. Here you search, find and edit customers and customer data. The respective contact persons, offers, products, materials and potential are presented to you in a clear and compact display. You can also use the mask to start processes and create, for example, service requests, contacts, activities and sales opportunities.



360° customer sheet

On the customer sheet, the system offers you a 360° view of your customer. Condensed into just a few pages, the address, contact details, contact persons, sales opportunities, offers, machines, service requests and other data are clearly provided to you.

Multi-object search

Starting from the “Customer” level, you can search for all linked objects across multiple levels, including customers, contacts, offers, inquiries, etc.

Suchen



Advanced sales and quotation process

The system guides you through the sales and quotation process and supports you in processing and tracking.

Sales opportunity assessment via the forecasting tool

Using this structured methodology, you can uniformly and systematically evaluate your chances of success in sales. "When does the customer want to place the order?", "Is the budget available for the order?", etc. The catalog of questions can be flexibly configured and the evaluation is used to calculate a weighted overall probability.

Pipeline management in sales requires reliable and objective information about the order probability of individual sales opportunities. ITVT's forecasting tool supports your company's sales staff in their daily work.

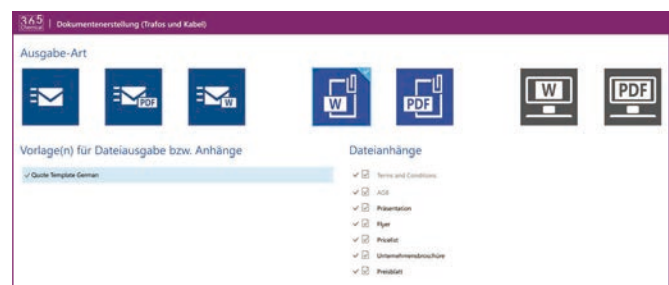
	F	E	D	C	D
Value	0 %	20 %	40 %	60 %	80 %
Need/Pain	no information	general interest	first problem understanding	described clearly	urgent need
Solution	unclear	solution largely meets requirements	solution feasible	solution approved	unique solution
Timeframe	no information	< 6 months	3-6 months	1-3 months	this month
Budget	no information	existing, but amount not disclosed	existing, amount is disclosed and matching	budget in approval process	budget approved
Authority	no information	one is known personally	all are known: decision taker, maker and recommender	all involved people are known personally	personal relationship to all and their motives are known
Competitor	no information	one or several competitors are known	competitor and product is known	we are preferred	no competitor

Close Probability 47 %
Last Change:

Advanced Mail Merge

With the ITVT tool for advanced document creation, you can generate flexibly designed, dynamic documents from various entities from Microsoft Dynamics CRM. The core functionalities are:

- ›Flexible design options of templates in Word
- ›Management of templates per entity
- ›Create and send directly Word and PDF documents
- ›Free choice of optional and mandatory components
Document (e.g. product brochures, general terms and conditions, etc.)
- ›Various configurable output formats (email, Email attachment, file share, SharePoint, direct print)



Project Sales

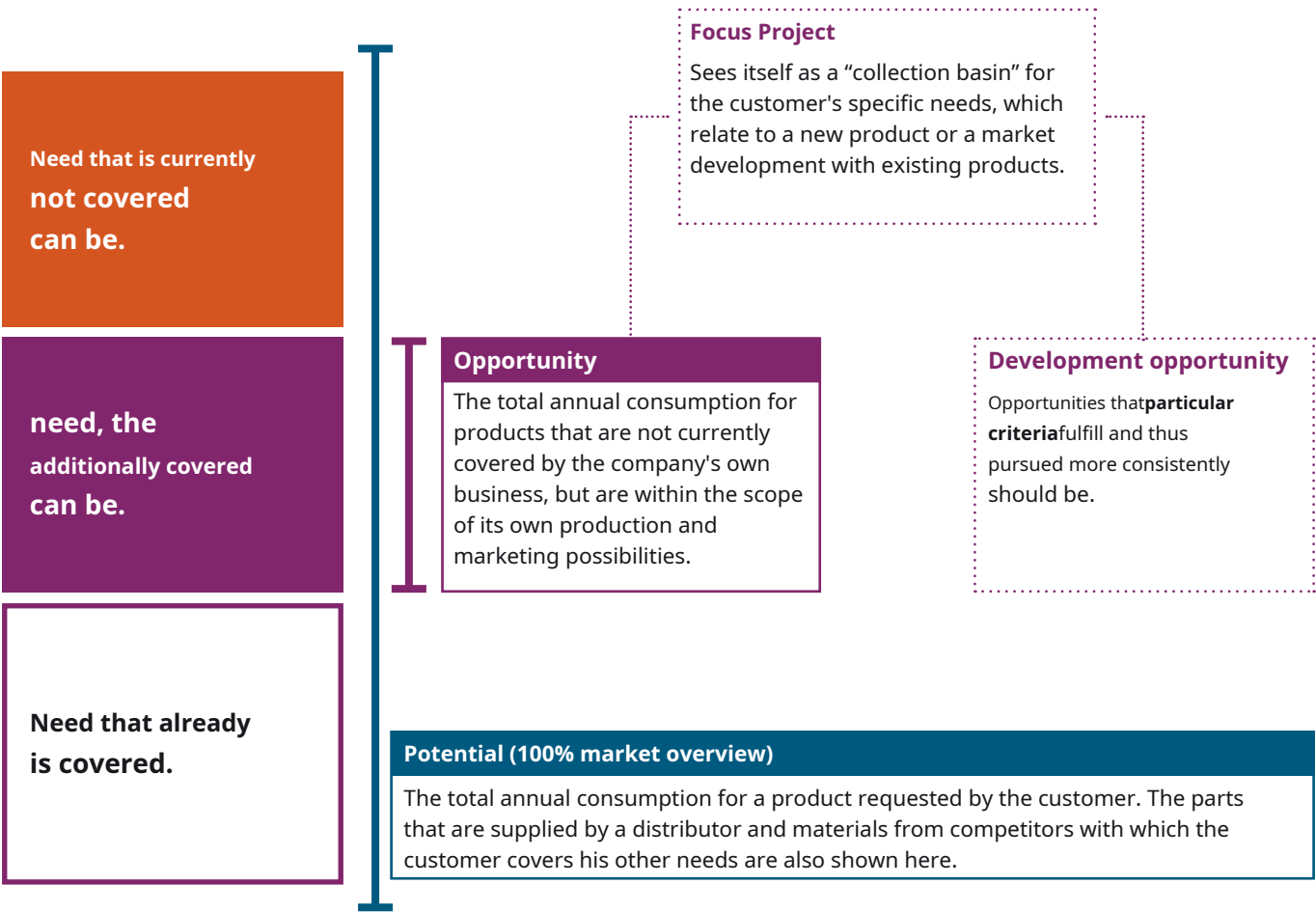
Design your sales projects in a structured and standardized way. Users are guided in the sales process through simple recording and maintenance. Your sales employees are supported in the quotation process and in tracking offers.

Sales area assignment

Do you structure your sales according to sales areas? A flexible set of rules automatically assigns interested parties, customers and sales opportunities to the responsible sales employees.

Analysis of potential and needs

Potential (100% market overview)



Pattern Management

Record requested and sent samples in your CRM system and always have an up-to-date display of which customers and interested parties have which samples. Enable tracking and easily check sample delivery deadlines. The 360° view of the customer gives you transparency about their sample orders and you can compare them to the actual orders.





















Sample shipping with DHL tracking

Send products, accessories and samples to your customers and export data from your service requests into the DHL standard software. Once the label has been printed, you can import the tracking number back into your CRM system.

In this way, you can track the shipment and automatically send your customer the tracking numbers including a link by email.

Grid editing

Manage contacts to the company or components to machines easily and quickly using editable grids in CRM forms. This allows you to create, adjust and update data directly in tabular lists without opening the individual forms.

AKTUALISIEREN + NEU SPEICHERN			
Component		Serial No.	Component
   Laser		40001229	Laser Tech AG 
   Transformer		80004221	Transform GmbH 
   Assembly Line		60002217	Assembly One KG 
   Scanner		30001886	Prime Scan AG 

Other components from Chemical365

Visit Report

Document your visits, acquired knowledge and customer contacts via a visit report directly in your CRM system.

Formattable free text information can be stored in the same way as structured, evaluable information. Initiate follow-up activities at the push of a button, such as sending sales documents and send the visit report in PDF form to a selected distribution group.

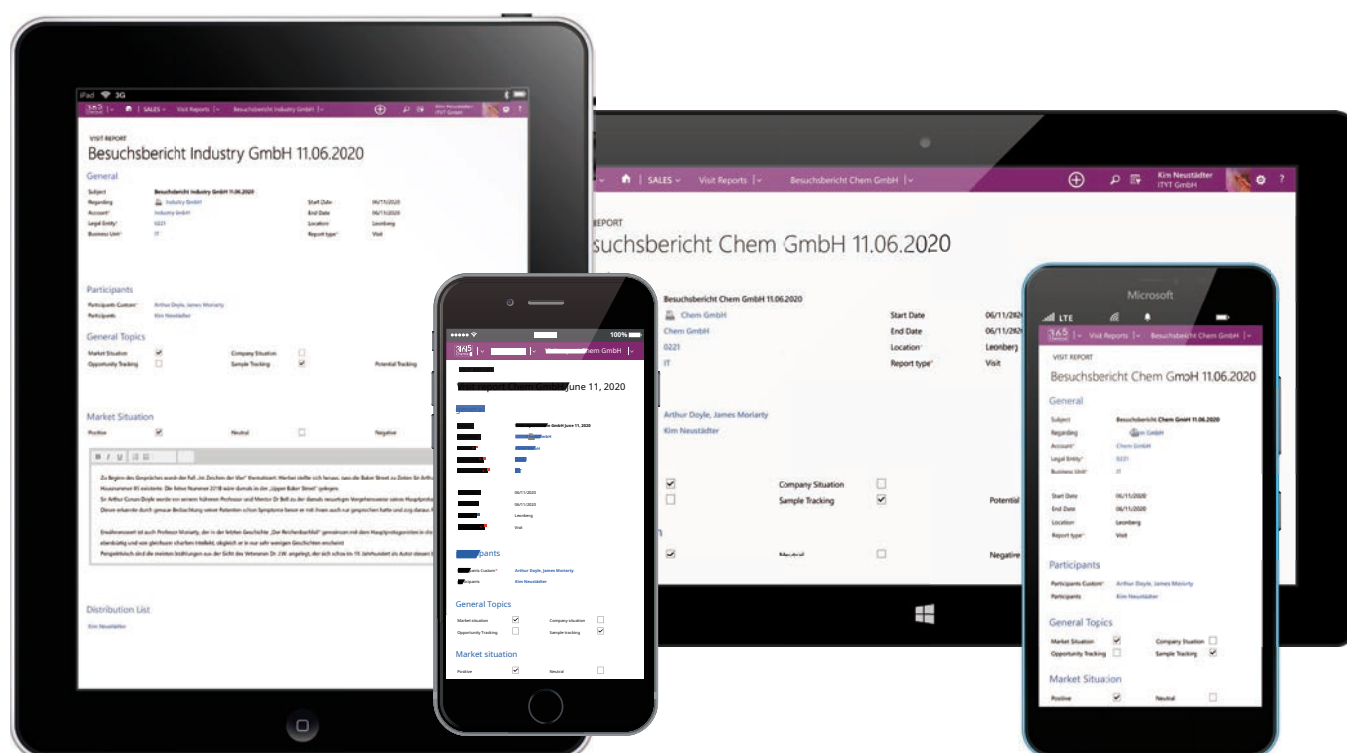
The screenshot shows the 'VISIT REPORT' form for 'Besuchsbericht Industry GmbH 11.06.2020'. The form is divided into several sections: 'General' with fields for Subject, Regarding, Account, Legal Entity, Business Unit, Start Date, End Date, Location, and Report type; 'Participants' with fields for Participants Custom and Participants; 'General Topics' with checkboxes for Market Situation, Opportunity Tracking, Company Situation, Sample Tracking, and Potential Tracking; 'Market Situation' with checkboxes for Positive, Neutral, and Negative; and a large text area for free text. At the bottom, there is a 'Distribution List' section.

Mobility

Increase your productivity and efficiency on the go with the free app for Microsoft Dynamics 365, available for smartphone and tablet (iOS, Android).

Stay productive even if your smartphone doesn't have a network or your tablet isn't connected to the internet.

The mobile apps store records that you have recently used so that you can access them even when you are offline. You can also capture new information by creating draft new records such as Accounts, Contacts, and Activities. When you reconnect, save the records created while offline.



Other components from Chemical365

Interface module

The ITVT interface module provides you with a component on the basis of which interfaces between your CRM system and third-party systems can be implemented and operated. Unidirectional data exchange from/to CRM is supported, as are bidirectional connections. The ITVT interface module enables seamless integration with SAP, Microsoft Dynamics 365 Finance, Operations, Business Central, Marketing, Sales, Commerce, HR, Service, etc.

Master data management

(including clearing process)

Refine your customer data and implement a structured master data management process via your CRM system. Critical fields and responsible clearing houses are defined via sets of rules. The process can be used with or without an ERP connection and is used, for example, when changing postal codes or the initial synchronization in a connected ERP system.

Service requests

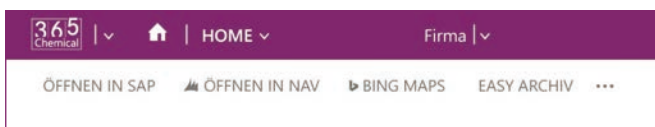
In the service module, requests (tickets) are recorded, prioritized and processed. The system supports you with the stored knowledge database as well as the queuing and dispatching functions.

Complaint management

Bundle the communication channels for customer complaints in your CRM system and thus complete the holistic view of the customer. All communication regarding complaints and the response and resolution of complaints can be tracked and evaluated at any time.

ERP linker (jumps into third-party systems)

Through seamless integration, you can jump from your CRM system directly into connected systems and display contextual information or complete the application process. Both internal systems (SAP, NAV, etc.) and internet applications (Bing, Bing Maps, etc.) can be controlled.



Multi-client capability

Map multiple applications as independent clients in a CRM system, including different configurations and data sets, depending on the area of application.

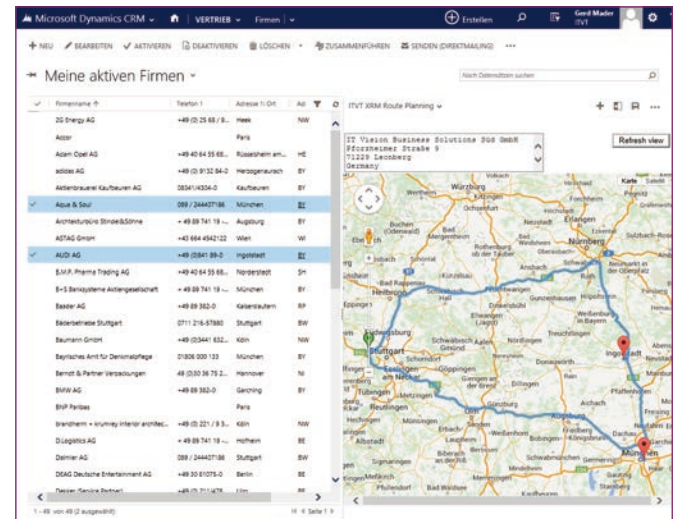
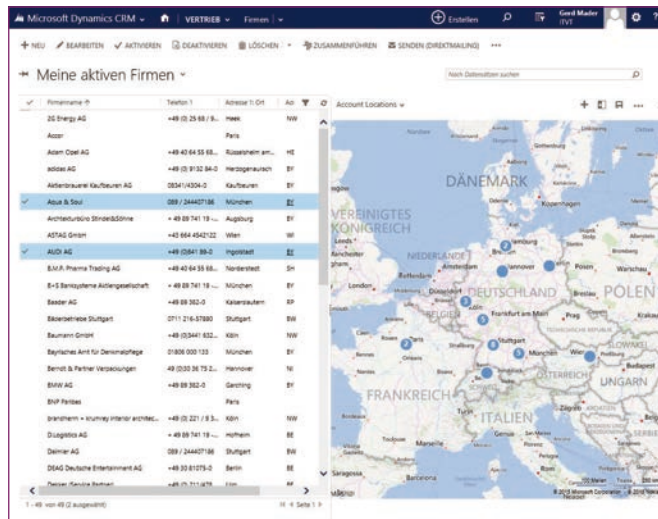
Approval process

Expand your system with a flexible and automated approval process. Approval requests are created based on an adaptable catalog of rules and forwarded to the decision-makers via email.

Multi-Bing Maps integration & route planning

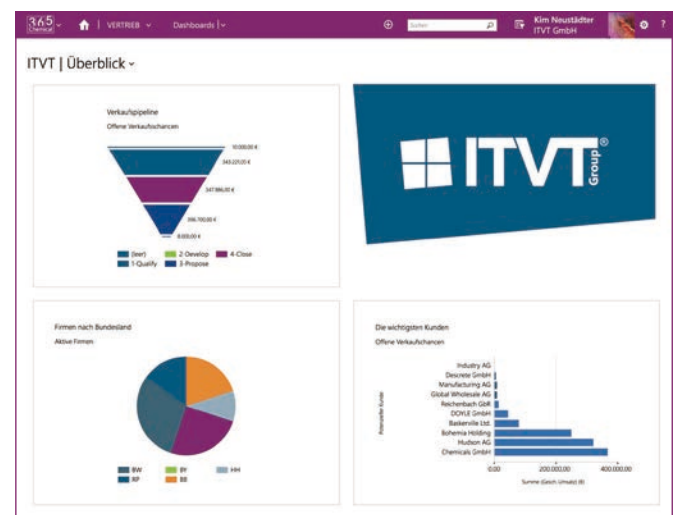
Have all companies or machines of a view or selection displayed in an integrated Bing Maps map.

You can also use route planning to calculate the journey to one or more destinations.



Dashboards & evaluations

With dynamic dashboards and diagrams you can evaluate the data in your CRM system and display it graphically. Additionally, use predefined reports and Excel integration, with which data can be dynamically transferred to Excel and further evaluated there.



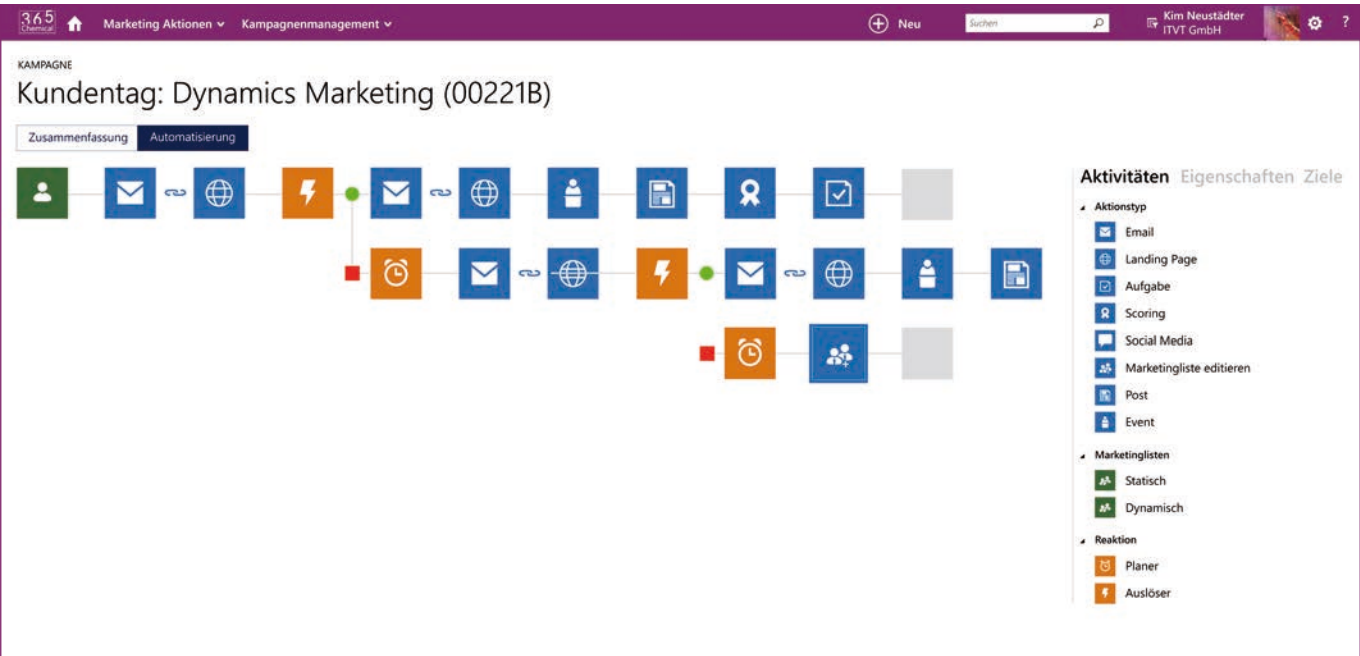
Other components for user support:

- › Generation of salutations (language-specific)
- › Country-specific structure of postal addresses
- › IBAN validation with check digit, bank code and bank
- › Automatically assign to queues or Teams based on configurable rules
- › ID generator for unique number assignment with defined number ranges and prefixes
- › Auto-Name for automatic name generation of data sets
- › Configurable data set copy tool

Microsoft Dynamics 365 Marketing

Microsoft Dynamics Marketing 365 is a comprehensive solution for integrated marketing management. The module provides comprehensive functions in the areas of resource management, marketing automation, planning and execution of multi-channel campaigns and success measurement.

Dynamics Marketing 365 can be used standalone or integrated into Dynamics 365. With the Marketing Connector, the transfer of relevant data is regulated via a predefined, easy-to-configure integration between both systems.

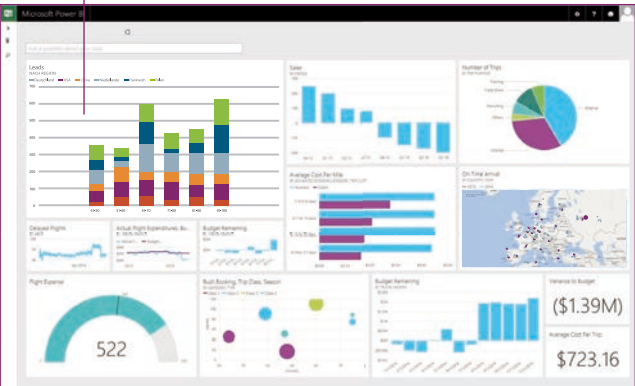
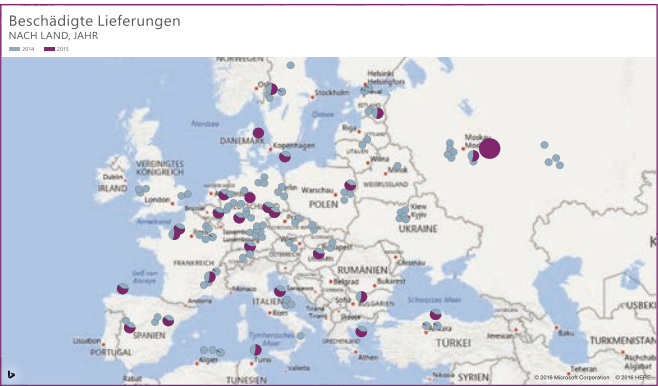
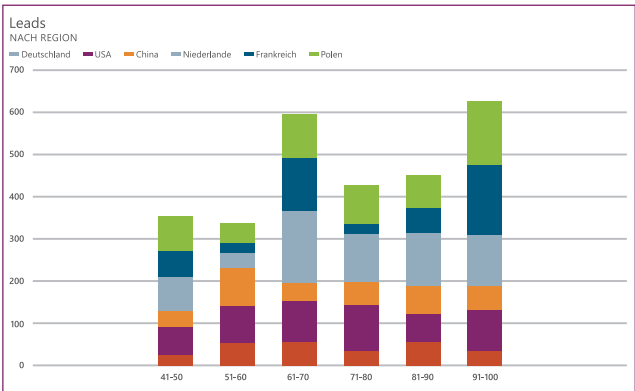


The business intelligence solution Microsoft Power BI

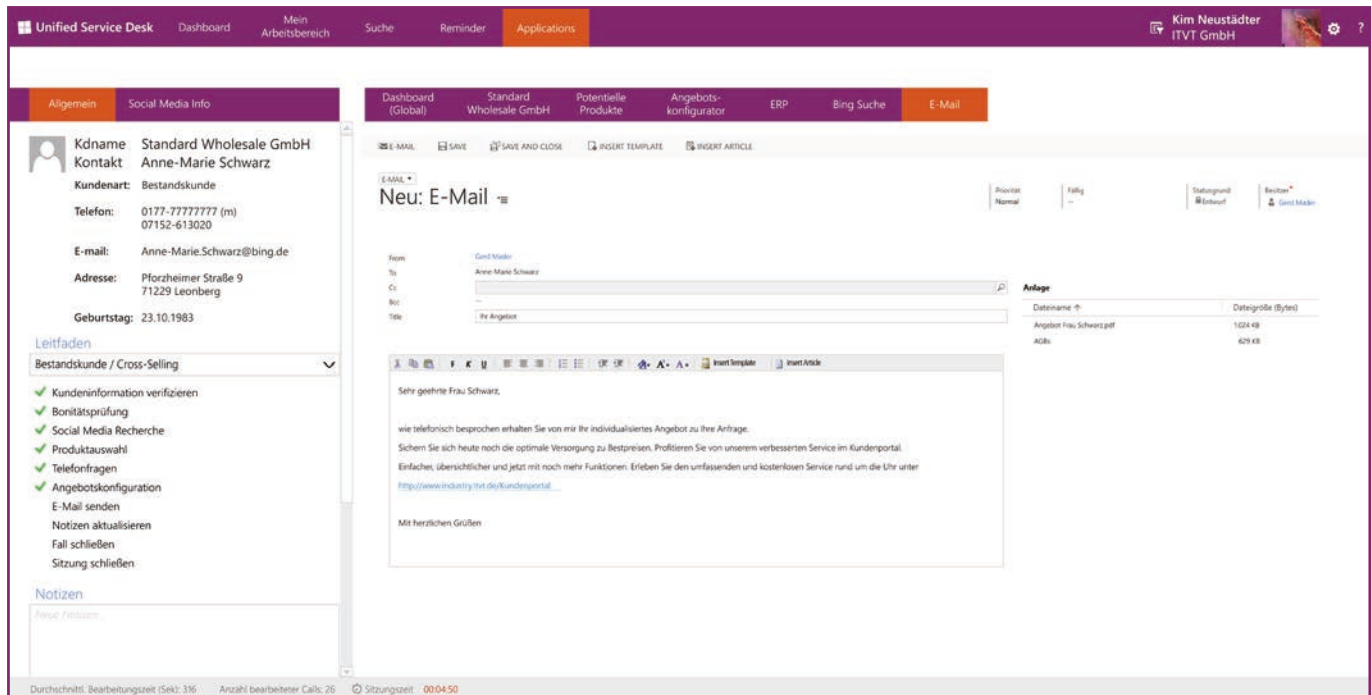
Create meaningful analyzes of your numbers quickly and easily. Support you in making timely and well-founded decisions for your company's success.

The business intelligence solution accesses various platforms and databases. Power BI provides numerous functions such as maps, diagrams and tables for the visualization and analysis of key figures in real time in an intuitive interface.

Power BI brings your company's data to life.



The solution for your customer center – Unified Service Desk



When it comes to managing customer interactions across multiple channels and centralizing them in a single application, even tech-savvy companies often face a challenge.

The Unified Service Desk expansion module provides employees in call centers - such as service hotlines or telesales - with a single interface.

It is not uncommon for employees to have to juggle seven to ten different applications to process just one process.

The friction losses are enormous and this is exactly where the Unified Service Desk comes in: This is where information and data from a wide variety of systems come together and are bundled and prepared for your employees. This means you can solve new cases more easily and, above all, faster.

Thanks to the simple operation and uniform interface, you can reduce training costs by up to 25% and achieve an increase in efficiency of up to 15%.*

Unified Service Desk allows multiple interactions to be processed simultaneously in one application, automates routine tasks and shows employees personalized information that supports quick processing.

The predefined, freely scalable scripts (e.g. telephone guide) and templates support your employees. This allows you to achieve the highest level of quality.

A 360° view shows all the necessary information, such as:

- › Contract data
- › Contract management
- › Social media information
- › Customer history
- › complaints
- › bills
- › Etc.

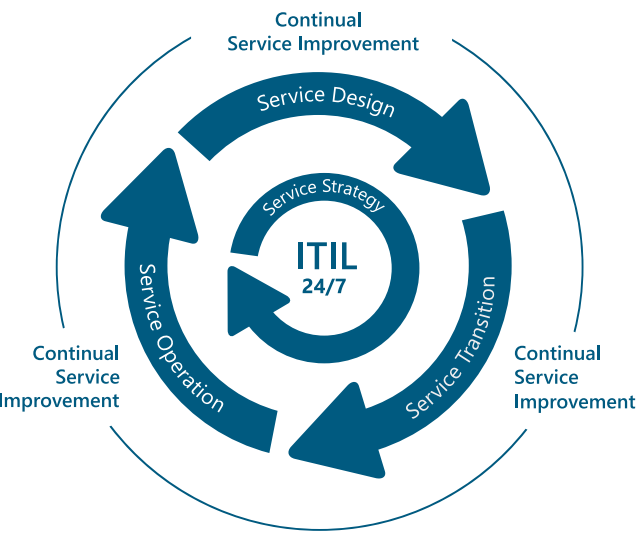
- ✓ **BIS ZU 15 % EFFIZIENTER ARBEITEN**
- ✓ **BIS ZU 25 % WENIGER SCHULUNGSKOSTEN**
- ✓ **BIS ZU 25 % MEHR UMSATZ**

Dynamics Support

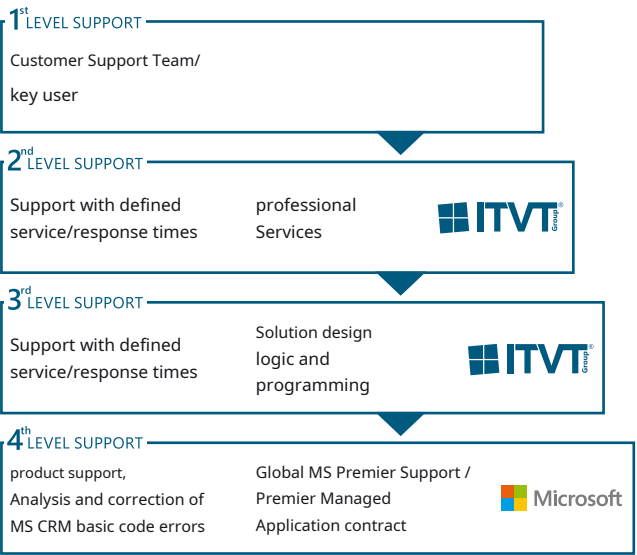
Sustainable project successes

The functionality of Microsoft Dynamics products is of fundamental importance for the smooth handling of your business processes. We therefore support you with extensive support services and thus create a reliable system - regardless of the size of the company and system. For us, a successful project does not end with implementation. To ensure sustainable project success for our customers

We will be available to generate these even after Dynamics 365 has been fully implemented. Our experienced Dynamics Support Engineers will support you with all technical or application-related questions and problems relating to Dynamics. Either as permanent support or spontaneously in the event of an emergency.



Example of a support model



Sustainable project successes

The satisfaction of our customers is our top priority, which is why we offer you tailor-made contracts - from service level agreements to support contracts or pure service quotas - as a customer you decide for yourself the scope of services, the response time and the service level of support. We are happy to help!



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Our partners





ITVT Group

The ITVT Group is an international provider of industry-specific CRM and ERP enterprise solutions based on Microsoft Dynamics. As a business consulting service provider, ITVT supports medium-sized companies in the IT-supported optimization of their business processes - from strategy and process consulting to questions about system selection, - implementation and integration. For hosting and cloud services, ITVT operates several BSI-certified high-security data centers in Germany.

The company was founded in 2001 and currently employs around 170 people. The group's headquarters is in Leonberg near Stuttgart.

ITVT is also represented at the locations Biberach, Essen, Hamburg, Karlsruhe, Kiel, Cologne, Leipzig, Munich, Nuremberg, St Petersburg (Florida, USA), Amsterdam (Netherlands), and Beijing (China).

ITVT customers benefit from many years of extensive industry experience, technological expertise and global presence at locations on three continents. We are specifically expanding our technological and business know-how and are also very familiar with innovation topics such as the Internet of Things (IoT), artificial intelligence, machine learning, big data and the cloud.

Successful projects of all sizes

Our experienced, highly qualified and socially competent experts ensure quick and seamless integration of our solutions into your system landscape.

Training and reliable 24/7 support

With our professional support in accordance with ITIL, you are always on the safe side. We support you in the smooth and efficient use of your CRM solution and Microsoft Business Solutions, the support of your IT infrastructure and the training of your users. You can immediately reach a friendly and competent ITVT specialist around the clock via our multilingual support hotline.

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Gold Cloud Business Applications
Gold Enterprise Resource Planning
Gold Cloud Productivity
Gold Cloud Platform
Gold Application Integration



Gold Application Integration
Gold DevOps
Gold Datacenter
Gold Data Analytics
Gold Windows and Devices



Gold Collaboration and Content
Silver Security
Silver Project and Portfolio Management
Silver Communications
Silver Small and Midmarket Cloud Solutions

Training

Application support

PROFESSIONAL SERVICES

Dynamics 365 Marketing

Power BI

Web portals

Unified Service Desk

SharePoint

CTI

Address validation

Master data management

Central customer center

Project Sales

Sales opportunity assessment

trade fair process

Multi-object search

Potential management

Visit reports(visit reports)

Maps & route planning

Sales area assignment

360° customer sheet

Fast processing

Approval process

Complaint management

Change Request Database

Sample Management Process

Service Report

ERP linker

Advanced Mail Merge

Timeline representation



Microsoft Dynamics 365

24x7 ITIL based support

ITVT high security data centers in Germany



Green
Hosting
Cloud

