



cobra[®] CRM PLUS 2009

Product information sheet

Target group	Suitable for small, medium-sized and large companies that wish to provide customer information via a comprehensive CRM system - company-wide or across locations.
Field of application	Sales, service, management, marketing, public relations, call center, support, office.
Address and contact management	<ul style="list-style-type: none"> ■ Flexible customizable program interface and database ■ Up to 500 fields per table ■ Up to 16 additional data tables for company-specific additional information, e.g. service claims, contract management and more ■ Additional data sub-tables NEW! ■ Copy and paste data records to sub-tables NEW! ■ Mass operations on sub-tables NEW! ■ Formula and count fields in addition to checkboxes and images ■ Comments and keywords ■ Date entry assistance and selection lists (optionally data dependent) NEW! ■ Duplicate check and merge NEW! ■ Hierarchical contact management and any number of address links ■ Contact history with automatic document management ■ E-mail connection and e-mail assignment in .msg format directly via menu bar in Outlook, Lotus Notes and Groupwise ■ Automatic e-mail assignment and address entry based on formatted e-mails e.g. from Internet shops (only with Microsoft Outlook) NEW! ■ Import and export of vCards and address import with drag & drop ■ Automatic removal of blanks NEW! ■ Data import and export in various formats (e.g. Access, Excel, text files, Outlook, dBase ...) ■ Unicode capability NEW!
Marketing, mailing & campaigns	<ul style="list-style-type: none"> ■ Multilevel selection possibilities in any number of fields and contacts ■ Filter, query and print functions in contacts, additional data and sub-tables NEW! ■ Storing of queries / selections ■ Unlimited number of keywords ■ Mail merge wizard ■ Serial mail wizard NEW! ■ Campaigns: mapping of workflows; task assignment per user or group; success monitoring; linking of campaigns NEW!
Appointments and tasks	<ul style="list-style-type: none"> ■ Efficient interaction of cobra CRM PLUS and cobra Appointment Manager by direct connection to the data record ■ Single and group planning, appointment series, substitute function ■ Task planning by due date, status and priority ■ Appointment synchronization with Outlook ■ Individually configurable Welcome Screen as control center for all variable data, with all due appointments and tasks, as starting point for your daily work NEW! ■ Optional integration of the cobra Appointment Manager or MS Outlook calendar NEW!
Customer service and back office	<ul style="list-style-type: none"> ■ Automatic telephone caller identification, dial function, call forwarding with ISDN telephony NEW! ■ Integration of HTML pages as knowledge databases, product catalogue, sales information and more ■ Perfect Microsoft Office integration ■ Letters, lists, labels, index cards in company layout at the touch of a key ■ Sophisticated format editor for specific formats ■ Call center functionality with project and client management
Sales and reporting system	<ul style="list-style-type: none"> ■ Sales projects module for mapping and control of individually configurable sales processes NEW! ■ Reporting system for the tabular and graphical evaluation of all sales projects, addresses, campaigns, contacts and additional data ■ Comfortable reporting wizard for the creation of individual reports NEW! ■ Statistics function for the evaluation of cobra-internal and external data NEW!

Mobility	<ul style="list-style-type: none"> Mobile users Synchronization of the system environment and database replication with notebooks, branch offices and home offices. Data can be replicated within the network or e.g. via dial-in or secure VPN connection (limitation to 230 fields). Terminal server compatible cobra Outlook synchronization of addresses, appointments and tasks with filters, formats and time-control NEW! 														
Communication	<table> <tr> <td>Telefax Letter / multi-letter / form letter</td> <td>established word-processing programs</td> </tr> <tr> <td>Fax</td> <td>all established programs</td> </tr> <tr> <td>Telephone dial function</td> <td>TAPI, VoIP via TAPI possible</td> </tr> <tr> <td>Call identification</td> <td>TAPI, VoIP via TAPI possible</td> </tr> <tr> <td>Internet telephony</td> <td>Skype</td> </tr> <tr> <td>E-mail</td> <td>fully functional range with Outlook, Novell Groupwise, Lotus Notes</td> </tr> <tr> <td>Other e-mail clients</td> <td>e-mail transmission per mailto; limited e-mail import</td> </tr> </table>	Telefax Letter / multi-letter / form letter	established word-processing programs	Fax	all established programs	Telephone dial function	TAPI, VoIP via TAPI possible	Call identification	TAPI, VoIP via TAPI possible	Internet telephony	Skype	E-mail	fully functional range with Outlook, Novell Groupwise, Lotus Notes	Other e-mail clients	e-mail transmission per mailto; limited e-mail import
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Rights management and security system	<ul style="list-style-type: none"> Network licenses System password and file password Integration of cobra user administration with MS Active Directory Detailed rights management with write and read permission at field and user level Private and group addresses Blocking of commands for individual users 														
Specifications															
System requirements	<table> <tr> <td>CPU</td> <td>Intel Pentium 4</td> </tr> <tr> <td>Client Operating System</td> <td>Windows XP, Vista</td> </tr> <tr> <td>Server Operating System</td> <td>Windows 2000, 2003, 2008</td> </tr> <tr> <td>MS Internet Explorer</td> <td>from version 6</td> </tr> <tr> <td>Memory</td> <td>above 512 MB RAM</td> </tr> <tr> <td>Hard-disk</td> <td>780 MB</td> </tr> </table>	CPU	Intel Pentium 4	Client Operating System	Windows XP, Vista	Server Operating System	Windows 2000, 2003, 2008	MS Internet Explorer	from version 6	Memory	above 512 MB RAM	Hard-disk	780 MB		
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Database	<p>MS SQL Server 2000, 2005, 2008 MS SQL Server 2005 Express (included) Limitation of the MS SQL Server 2005 Express:</p> <ul style="list-style-type: none"> Max. 1 CPU 4 GB database size No SQL Server Agent No SQL Server Agent Service No entire management platform (Management Studio); only Express Manager MS SQL Server 2005 Express can be subscriber but not publisher for replication 														
Data volume	Number of addresses not restricted; database size not limited (see above: SQL Server Express)														
Data processing	High performance through client-server technology: all computing operations are performed on the server, only results are transferred via the network														
Supplied data	<table> <tr> <td>Postcodes</td> <td>D, A, CH, and further postcodes in Europe</td> </tr> <tr> <td>Text modules e.g.</td> <td>salutations, lines of business, symbols</td> </tr> <tr> <td>Formats</td> <td>for address labels, address lists, form letters, letters, index cards</td> </tr> </table>	Postcodes	D, A, CH, and further postcodes in Europe	Text modules e.g.	salutations, lines of business, symbols	Formats	for address labels, address lists, form letters, letters, index cards								
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Data security	<ul style="list-style-type: none"> Professional backup solution: security mechanisms prevent data loss, even in the case of an abnormal system end and allow for systematic recovery; database maintenance plans ensure optimized data stock. High level of protection against data abuse by the SQL Server certified data protection mechanism. 														

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