

DATASHEET

ONYX CRM

WHAT IT IS

Onyx is a proven, 100% web-based solution for organizations to power customer relationship management (CRM) strategies. Onyx is a single, unified application with a customer-centric design. In just one place, Onyx can provide the 360 degree view of the customer: customer details, customer relationships and hierarchy, support incidents, sales opportunities, campaigns, contact history, emails, appointments and more. Onyx gives your organization a full suite of functionality to provide the best possible customer experience.

WHAT IT DOES

Customer Management

Onyx's customer-centric design puts customers at the heart of the CRM solution providing a user-friendly view of all customer data and interactions. The extensible model allows any number of additional customer fields.

Navigator

This capability combines powerful search technology with the productivity of work management features into an intuitive user interface that allows users in any role to find information and fully manage his or her work. Navigator also allows users to easily edit search result records from within the search results grid in a variety of ways: 1) Edit the record inline; 2) Launch the full record and edit there; 3) Select multiple records to do a bulk update.

Navigator has been designed to be simple enough for all end-users to configure, but is also sophisticated enough for advanced users to conduct searches, manage lists of records, and research without requiring IT assistance. Furthermore, Navigator is extensible, so it gives you the flexibility you need without applying code-level customizations.

Homepage

In Onyx's enhanced homepage, you can sort dynamically and have several Pools showing side-by-side in real-time, all in one place, and on the same page as your Calendar and Reports. Using the functionality in the homepage, all agents can have their own set of queries and filters set up using Navigator described below.

Support and Service Incidents

Allows an organization to manage its customer service and support and incident ticketing process from start to finish. Support incidents can include any number of discrete tasks assigned to specific individuals or groups as part of the workflow to orchestrate the support process to a successful end. Furthermore, support incidents can be aggregated into one or more work tickets so that the parent-child relationships allow the appropriate item(s) to be worked at the appropriate time.

Sales Opportunities

Onyx provides all the tools necessary to automate and manage the sales process so that leads can be tracked all the way from the prospect to the customer stage. With the quoting, forecasting and flexible workflow, orchestrating the sales process takes the headache away from sales people so they can focus on selling!

Process Automation and Scripting

Process Scripting / Workflow provides a wizard-like, end-user interface with which users can guide their interactions with customers, create Sales Opportunities or Support Calls, or automate any process. Never again will interactions be inconsistent among different agents.

Onyx 360 for Outlook

Onyx 360 is an Outlook panel for both calendaring and email functionality. This allows users to interact with the Onyx CRM records directly from Outlook.

The Onyx 360 panel enables the user to associate his/her own Microsoft Outlook appointments and emails with Onyx to increase productivity. This feature allows users to manage appointments and emails down at the incident level (sales, service and support) or as a general customer interaction.

In addition, you can email directly to your customers and prospects within Onyx to keep a history of all your email interactions. This single, unified view will bring visibility to all your email communications occurring with each contact.

Dashboards and Reporting

CM's latest release includes Microsoft SQL Server Reporting Services (SSRS) Business intelligence (BI) integration and many new prepackaged dashboard reports. You can utilize these pre-built reports as well as create new ones for better decision making. There are a number of out-of-the-box reports included such as:

- Companies by Type
- Top Opportunities
- Multiple Forecast Reports
- Sales Pipeline and other User Pipeline Reports
- Fall-Out Reasons
- Customer Incident Summary
- Total Incidents by Product and by User
- Resolution Time Summary by User

Onyx Mobile

Onyx Mobile runs on iPhone/iPad/Android platforms and integrates with your Onyx CRM system so that you can manage all your customer/case interactions on the go. With the Onyx native apps you can:

- Search for and view details of existing customer records
- Modify/Add customer records such as phone number, email, address, as well as contacts
- View a list of Favorite and Recent customers
- View directions to your customer's location
- Write emails to and call customers from within the application
- View lists of incidents/tasks which are relevant to a single customer or the logged in user
- Edit incidents, tasks, add work notes and contacts
- View Navigator Mobile Bookmarks

WHY YOU NEED IT

Onyx improves and streamlines the ability to effectively manage your customer relationships and interactions by offering one solution that provides all the needed tools and information. Below are just some of the capabilities that drive better customer management:

- Single, customer screen to organize customer details, contacts, relationships, history, incidents, email communication, appointments, surveys, campaigns and scripts.
- Configurable process and scripted workflows.
- Ability to manage different users' roles using configuration tools.
- Open standards-based architecture to allow for the integration to transactional systems.

MORE ON ONYX

Onyx is built on a simple design philosophy: Life is complicated, Customer Management should not be! Usability and productivity are key! Onyx leverages modern Web 2.0 technologies and user paradigms and is optimized for flexibility. Onyx provides a full toolbox of administration tools including UI Configuration Workbench, Object Designer, SQL Generation, Business Rules Manager, and more to support the ever-changing business requirements that a dynamic organization faces with simple configurations rather than customizations. And integration with social media technologies and the ability to access the system anywhere from any mobile device—a Android or iPhone for example—ensures that you stay up-to-date with all the information about your customers.

ABOUT APTEAN

Aptean, a global leader in enterprise application software (EAS), gives businesses of all sizes a competitive edge. We empower people and businesses with end-to-end, industry-specific solutions to address complex business challenges more effectively. Our software applications and professional business services enable more than 9,000 customers, in more than 100 countries. Software built specifically for our target markets aligned with deep knowledge across vertical industries allow businesses to satisfy their customers, operate most efficiently, and stay at the forefront of their industry. For more information, visit www.aptean.com.