



DATA SHEET

The Companies module

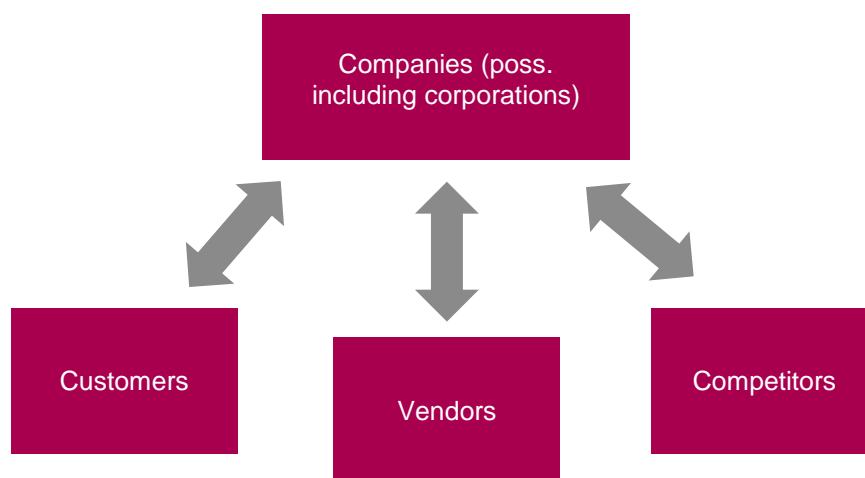
The project environment has a great influence on the success of projects. Therefore, project-oriented companies also need market information in addition to project information.

In KLUSA you cannot not only manage project-related data but also all information regarding its environment. This includes customers, vendors, competitors, but also your own subsidiary companies. KLUSA can handle business processes from offer to invoice. Thanks to an integrated evaluation system you can also make informed decisions concerning vendor selection. Thus, important information is held in one place, eliminating unnecessary communication loops.

Project management and its market-oriented perspective

Market knowledge is essential for companies to prove successful in the long run. Especially the knowledge of customers, vendors and competitors is crucial for the success of a project.

- Customers and interested parties are the most important assets of a company. KLUSA offers an integrated CRM system where all customer processes can be depicted.
- Companies are in constant communication with vendors and business partners. Good documentation of company information (such as contacts, products, services, prices) makes the work easier for the respective departments and management.
- You should also focus on the competitors: It is important to know how your products and services are positioned, where you are ahead and which areas could be improved. With this information you can derive market strategies and measures.



Interactions in the company environment

During project implementation project managers and specific departments (such as sales, marketing, purchasing, order processing, and accounting) need access to information about different companies. For this purpose, we developed the KLUSA Companies module.

The Companies module

The Companies module offers the following functions:

- Four different company types: vendors, customers, competitors and corporations
- Overview of all listed companies by type as list with filter function
- Administration of general company information
- Exchange of news with colleagues using the "Notes" function
- Assigning products and services
- Creating transactions (including offers, orders, invoices, credit notes etc.)
- Display of linked projects for customers and vendors
- Creating activities incl. email notifications
- Integrated document management system (DMS)
- Scoring options per company
- Scoring of all companies of one type in comparison
- Linking of vendors and customers with the Projects module

- Display of personal activities (to-dos) for companies in the MyKLUSA module
- Various configuration options for company attributes in the Administration module

Administration of companies

Users can enter general company data such as main contact, industry, addresses and billing data per company. It is possible to create additional contacts that can also be edited in the Projects module. Additionally, it can be defined which users should have access to specific companies. Employees can send notes directly from KLUSA to exchange e.g. news with each other.

Products and services

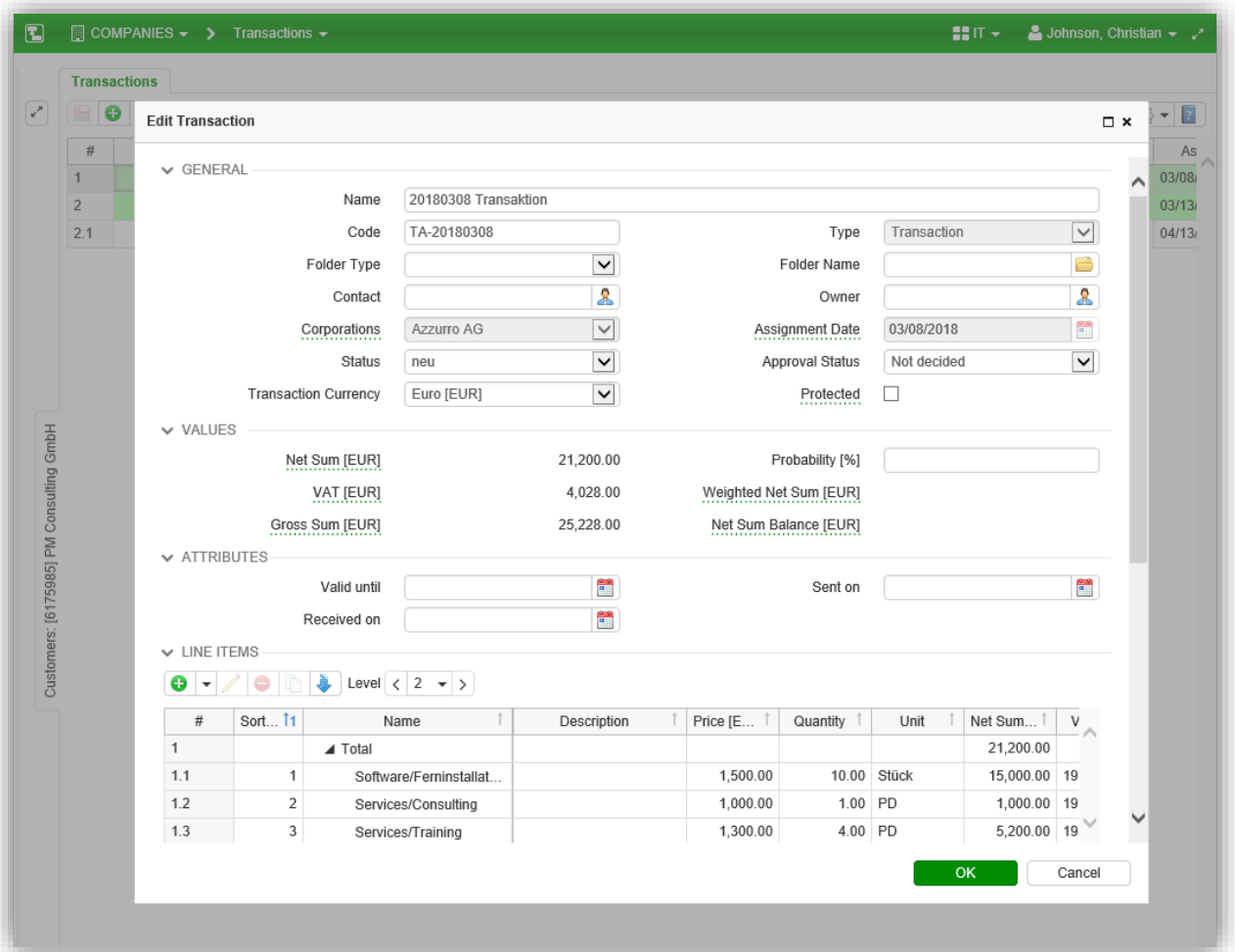
Users can create price lists for products and services of a company. If a price is updated, the old price is moved to "history". As a result, you can easily analyze price developments. If required, skills can also be assigned. Products and services can be structured by individual groupings.

Generating transactions

With transactions, users can create and manage important processes like offers, orders, order confirmations, invoices, invoice cancellations, credit notes and unspecified transactions directly in KLUSA.

You can select the appropriate sender (e.g. a specific subsidiary company) for each transaction. A copy function makes it easy to create similar transactions. Assigned products and services can be selected at creation, thus reducing manual effort to a minimum. The transactions can be arranged hierarchically so that you can depict complete business processes from order to invoice.

An overview of all transactions per company type gives a summary of current business processes.



Creating an offer

Activities workflow

Activities offers an overview and the editing of tasks of a particular company. You can also assign activities to employees and use them as reminders. Users can create and describe activities for a variety of tasks and actions. When due dates are reached, emails can be sent automatically to managers and responsible persons.

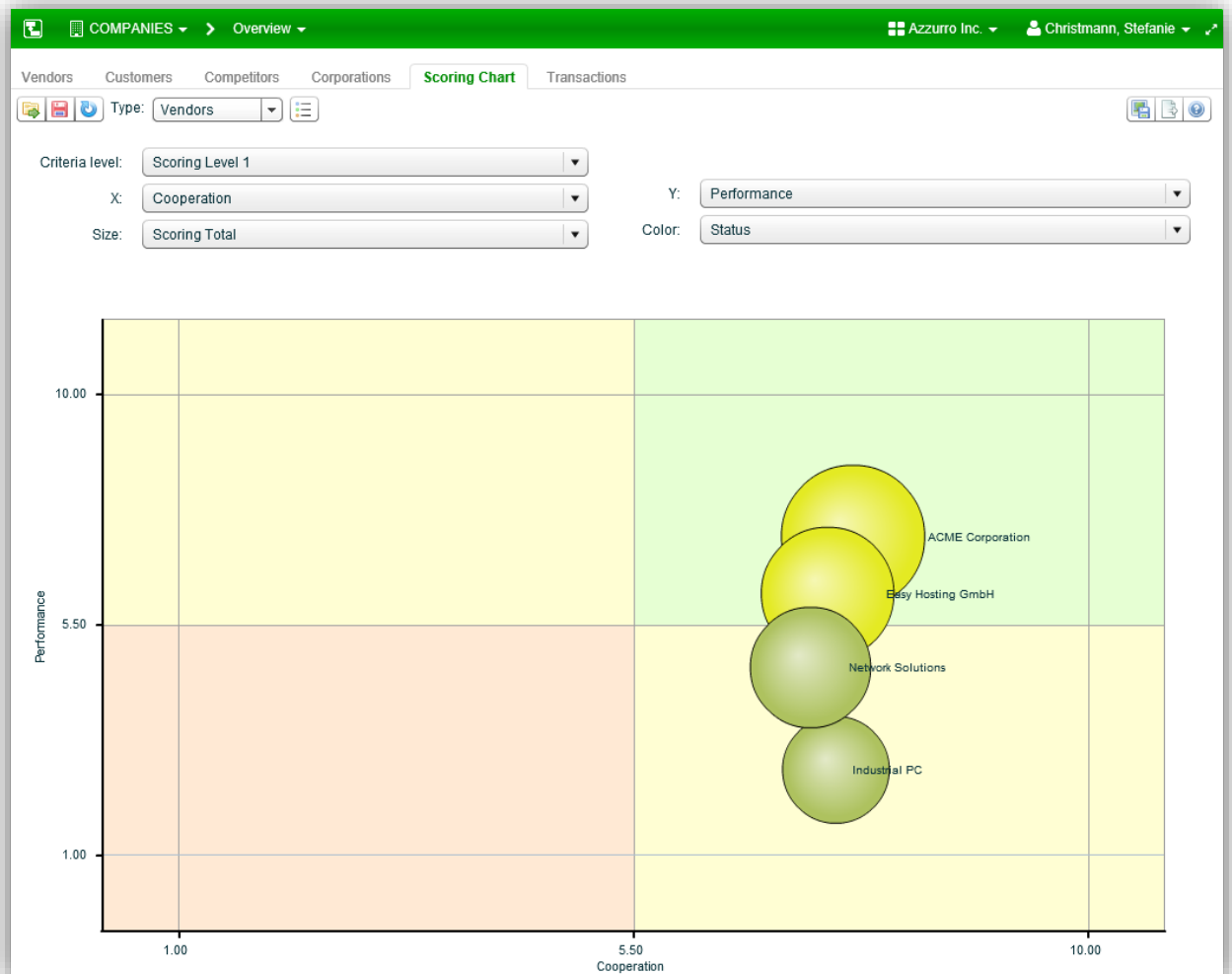
Evaluation of vendors

Using benefit analysis, various scoring teams can evaluate companies. The evaluation criteria, as well as the weighting factor, can be determined individually. The average score across all review teams is available at any time.

In addition, you can see the scorings of all companies of a certain type in a bubble chart. Here, it is possible to compare companies from different perspectives (such as technical, functional or economic). The users can individually decide which criteria to use.

This results in interesting use cases, e.g. for the company type "competitor". Apart from merely collecting information about companies and their products, you can judge your own position compared to potential competitors. As a consequence, you can, i.a., better assess market trends, chances of success and price developments.

Of course, you can apply the same process with a different focus to customers, vendors and your own subsidiary companies.



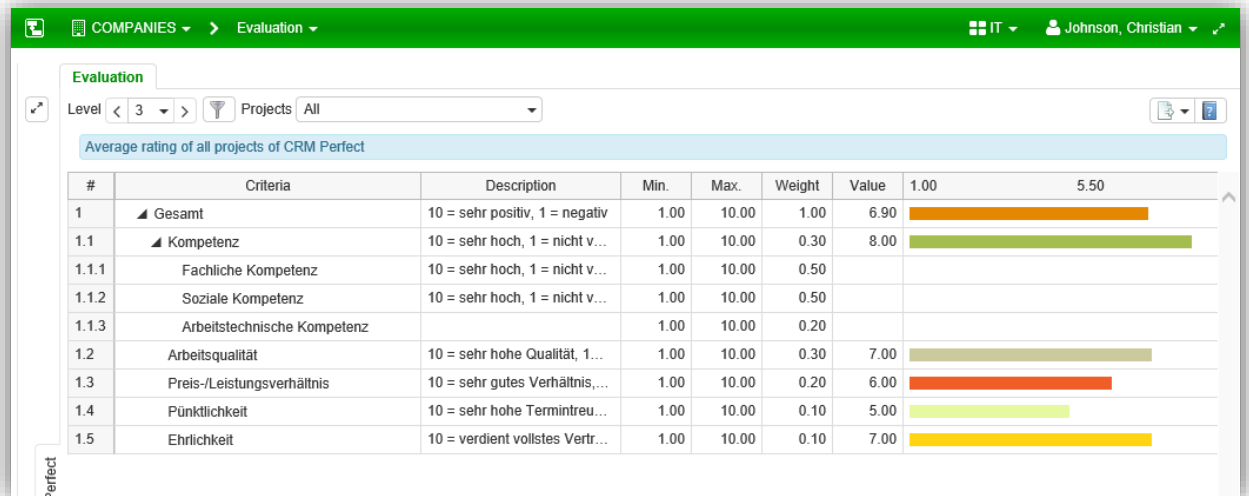
Benefit analysis of all companies (here: vendors)

Linking vendors with projects

In Projects module, it is possible to link one or more vendors to a project. KLUSA offers the following functions:

- Searching, assigning and categorizing of vendors to projects
- Access to general vendor data
- Access to the vendor's product and service portfolio
- Managing contact data
- Rating per project

The scoring of vendors can be viewed per project, but also cross-project. This data can help to decide which vendors should be involved in the next projects.



#	Criteria	Description	Min.	Max.	Weight	Value	1.00	5.50
1	▲ Gesamt	10 = sehr positiv, 1 = negativ	1.00	10.00	1.00	6.90		
1.1	▲ Kompetenz	10 = sehr hoch, 1 = nicht v...	1.00	10.00	0.30	8.00		
1.1.1	Fachliche Kompetenz	10 = sehr hoch, 1 = nicht v...	1.00	10.00	0.50			
1.1.2	Soziale Kompetenz	10 = sehr hoch, 1 = nicht v...	1.00	10.00	0.50			
1.1.3	Arbeitstechnische Kompetenz		1.00	10.00	0.20			
1.2	Arbeitsqualität	10 = sehr hohe Qualität, 1...	1.00	10.00	0.30	7.00		
1.3	Preis-/Leistungsverhältnis	10 = sehr gutes Verhältnis,...	1.00	10.00	0.20	6.00		
1.4	Pünktlichkeit	10 = sehr hohe Termintreu...	1.00	10.00	0.10	5.00		
1.5	Ehrlichkeit	10 = verdient vollstes Vertr...	1.00	10.00	0.10	7.00		

Overall scoring of companies (here: vendors)

Connection to MyKLUSA module

Besides open work package activities you can also see open company activities in the My Activities section. For a better distinction KLUSA displays the company types vendors, customers, competitors or corporations as reference. Via "Go To" button the user can jump directly to the Companies module.

Summary

With the Companies module Sales, Marketing, Purchasing but also Product Management and Project Management can work with the same data and scorings.

- Customers: In addition to account management in terms of a classic CRM system, KLUSA offers the possibility to link projects to accounts. Thereby, project managers can directly see existing general data and scoring information. Data is centrally managed and can be used without any further application.
- Vendors: Central vendor- and project-related scorings provide a solid base for the thorough selection of suitable vendors for future projects.
- Competitors: Discover your own strengths and identify improvement opportunities using market and competition analyzes.
- Corporations: Manage your subsidiary companies, e.g. to clearly distinguish accounting entities within transactions.

Please contact us! We can show you how to successfully use KLUSA in your company.



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