



## DATA SHEET

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### Companies

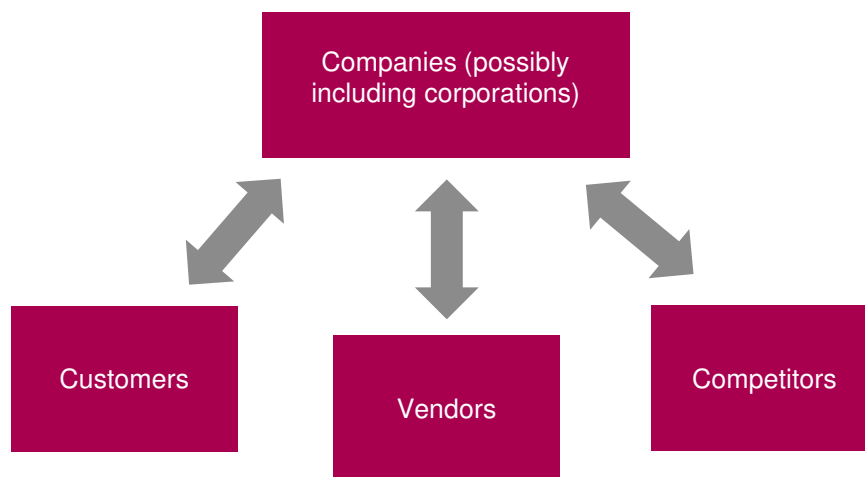
The project environment has a great influence on the success of projects. Therefore, project-oriented companies do not only need project information but also market information.

In KLUSA you cannot not only manage project-related data but also all information on the environment. This includes customers, vendors, competitors, but also your own subsidiary companies. KLUSA can map 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 market-oriented perspective

Market knowledge is essential for companies to prove their worth in the long run. In particular, the knowledge of customers, vendors and competitors is crucial for the success of a project in this case.

- Customers and interested parties are the most important assets of a company. KLUSA offers an integrated CRM system where you can map all customer processes.
- 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 departments and management.
- But it is also important not to lose sight of the competitors and to know how your own products and services are positioned in the market, where you are ahead and where there is room for improvement. From this you can derive strategies and measures.



Interactions in the company environment

During the operational project implementation, project managers and concerned departments (such as sales, marketing, purchasing, order transaction, and accounting) need access to information on the company types mentioned above. For this purpose, we developed the KLUSA COMPANIES module.

## The Companies module

The COMPANIES module offers the following functionality:

- 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 "Comments" 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 notification
- Integrated document management system (DMS)
- Scoring options per company
- Scoring of all companies (of one type) in comparison
- Linking the company types vendors and customers to the PROJECTS module

- Display of personal activities (to-do list) for companies in the MYKLUSA module
- Various configuration options for company attributes in the ADMINISTRATION module

## Administration of companies

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

## Products and services

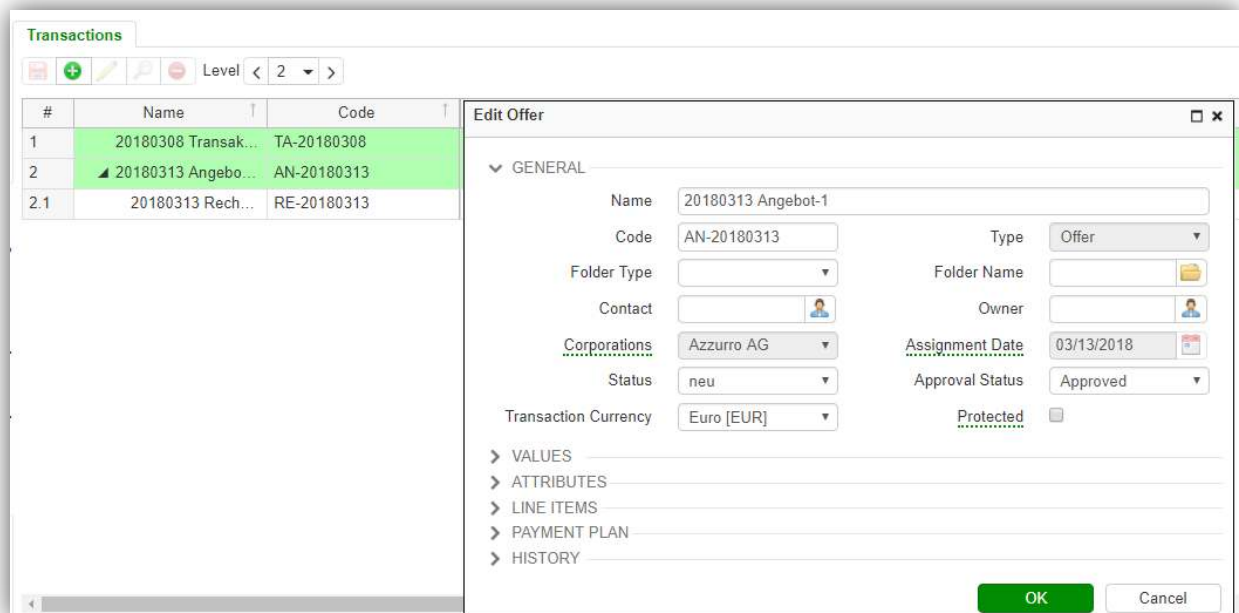
You can assign price lists for the respective products and services per company. If a price is updated, then the old price remains in the history. Thus, you can easily analyze price developments. If required, also skills can be assigned. Products and services can be structured by means of individual groupings.

## Generating transactions

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

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

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



The screenshot shows the 'Transactions' interface. On the left, a table lists transactions with columns for '#', 'Name', and 'Code'. The second row is highlighted in green. On the right, the 'Edit Offer' form is open, showing fields for Name, Code, Type, Folder Type, Folder Name, Contact, Owner, Corporations, Status, Assignment Date, Approval Status, Transaction Currency, and Protected. The form is currently displaying the details for the selected transaction.

#	Name	Code
1	20180308 Transak...	TA-20180308
2	20180313 Angebo...	AN-20180313
2.1	20180313 Rech...	RE-20180313

**Edit Offer**

GENERAL

Name: 20180313 Angebot-1

Code: AN-20180313

Type: Offer

Folder Type: [Dropdown]

Folder Name: [Text]

Contact: [User Icon]

Owner: [User Icon]

Corporations: Azzurro AG

Assignment Date: 03/13/2018

Status: neu

Approval Status: Approved

Transaction Currency: Euro [EUR]

Protected: [Checkbox]

VALUES

ATTRIBUTES

LINE ITEMS

PAYMENT PLAN

HISTORY

OK Cancel

Creating an offer

## Activities workflow

Activities offer an overview and editing of tasks for the respective company. You can also forward the activities to employees and use them as reminders. Thus, you can create and describe activities for a

variety of tasks and measures. When due dates are reached emails can be sent to managers and responsible automatically.

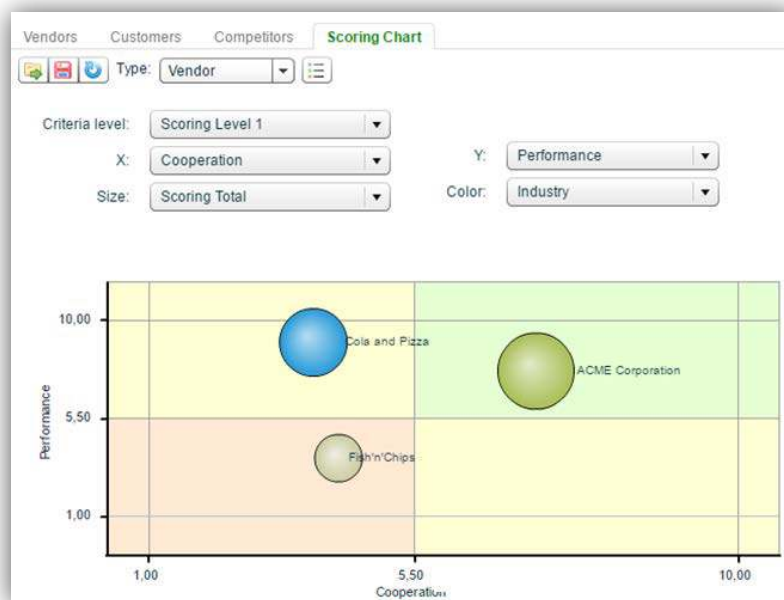
## Evaluation of vendors

Using the benefit analysis, various scoring teams can evaluate companies. The evaluation criteria, as well as the weighting, 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 themselves decide which criteria to use.

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

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



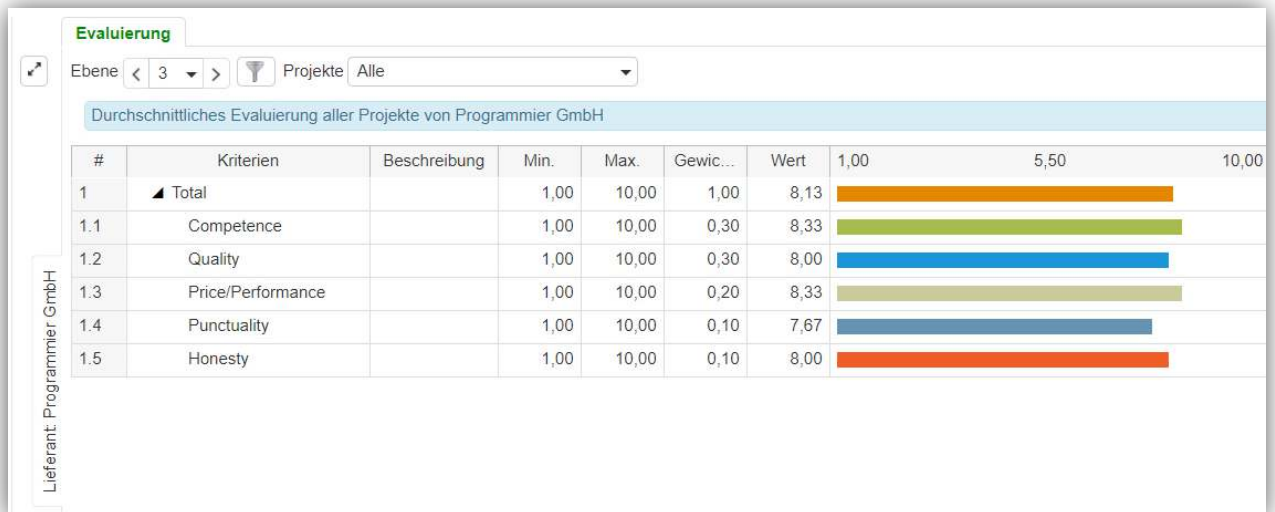
Benefit analysis of all companies (here: competitors)

## Linking vendors with projects

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

- Searching, assigning and categorizing of the vendor to the project
- Display of the general vendor data
- Display of the product and service portfolio of the vendor
- Contact data
- Rating per project

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



Overall scoring of companies (here: vendors)

## Linking to the MyKLUSA module

In the My Activities section, you can see open activities from the COMPANIES module besides open activities from work packages. For distinction, KLUSA displays the company types vendors, customers, competitors or corporations as reference; a "Go To" button leads here directly to the COMPANIES module.

## Summary

With the COMPANIES module, sales, marketing, purchasing staff as well as product management and project management responsables can work with the same data and scorings.

- **Customers:** In addition to customer management in terms of a classic CRM system, KLUSA also offers the possibility to link to a project so project managers can immediately see existing general data and scoring data. So, you can centrally manage and continue to use data without further application.
- **Vendors:** Central vendor and project-related scorings provide a solid basis for the careful selection of suitable vendors for future projects.
- **Competitors:** Discover your own strengths and identify improvement opportunities using market and competition analyzes. Planning and implementation of proper strategic and operational measures in new projects.
- **Corporations:** Manage your subsidiary companies, e.g. to clearly distinguish controlling areas within transactions

Please contact us! We show you how you can successfully use KLUSA inside your company. Ask for a KLUSA presentation and decide for yourself.



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