



Excellence in production control and administration for manufacturing businesses

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CRM FUNCTIONALITY INTEGRATED WITHIN PSL DATATRACK

CRM functionality and a dedicated Task Management module are the latest additions to the PSL Datatrack production control system for engineering sub-contractors. CRM (Customer Relationship Management) can cover many areas depending on the type or style of a business. The flexible CRM and Task Management functionality in PSL Datatrack are focused on the needs of a sub-contract manufacturing business to maximise their own administration efficiency, thereby laying the foundations for improvements in all their customer-focused administration.

PSL Datatrack is a modular production control system with features ranging from Quotations to Invoicing whilst incorporating manufacturing specific controls such as scheduling, shop floor data collection, non-conformance and complete traceability for ISO registered companies. For existing users these new features take management of the business to another level and provide an added incentive to those considering investment in a Datatrack system.



The CRM and Task Management module offers many advantages over web-based CRM systems that are available which can often be too complex or include features that are not relevant for a sub-contract business. They can be labour intensive to operate, requiring excessive manual input as they are not integrated with the business's management system.

New features include a single register for customer contacts that can be shared by everyone within an organisation, rather than each person having their own contact information, as well as document management that enables customer, and supplier, correspondence to be saved. Tasks can be assigned to Quotations, Works Orders, Purchase Orders or any other modules, making information available for everyone to access.

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A sales pipeline feature enables forecasting of the likely success from quotations, as the quote can be graded according to the expectancy and timing of obtaining a potential order. Automatically generated consignment emails can advise customers when goods have been despatched.

The Tasks Management Module provides a powerful multi-user shared “to do” list which, in addition to the module related tasks, can be used to define any non-production administration or management tasks. These could include tasks such as maintenance on machine tools, cutting oil trials, stocktaking, update of ISO procedures, staff performance reviews and many other options. Actions for tasks are assigned and then automatically sent by email to those responsible, contributing to management effectiveness by setting action and completion dates.

In line with ISO 9001 requirements, the module can be used to manage a company's drive for continual improvement; the CRM Task module can record, measure and provide evidence of tasks as the basis to drive continual improvement.