

NexJ CRM for Tablets



NexJ Customer Relationship Management (NexJ CRM) for Tablets provides direct, real-time access to integrated enterprise customer information and key business functions on an iPad. Advisors and agents can securely access the information and functionality they need on the road, formatted for the tablet form factor and touch-screen interface.

With NexJ CRM for Tablets, advisors and agents can be more productive in the field and improve the customer experience with 'anytime, anywhere' service. They can quickly and easily view, add, and edit contacts, schedule items, tasks, conversations, leads, and opportunities directly from the iPad. They can leverage robust CRM functionality to act on opportunities, launch onboarding and quoting processes, and respond to customer requests without delay.

NexJ CRM for Tablets is optimized for the needs of the mobile user and works hand-in-hand with the tablet's native characteristics. A clean user interface, wide selection of workspaces, and rich feature set are designed to support the day-to-day needs of advisors and agents in the field. Integration with the same solution used by desktop users enables users to easily toggle between a tablet and computer as desired to complete tasks and service customers.

NexJ CRM for Tablets is a web-based mobile solution, which means no data is resident on the tablet. In addition, NexJ CRM for Tablets leverages the same security model as the desktop solution so that access to data and functionality is managed according to the same roles and privileges for both desktop and mobile users.

Key Benefits

Increase Productivity

- Access comprehensive information and functionality optimized for the iPad form factor and touch-screen interface
- Capture and share information with other team members
- Create and assign tasks on the spot

Drive Revenues

- Input new leads and opportunities and immediately create follow-up activities
- Convert leads and launch onboarding

Improve the Customer Experience

- Deliver personal service whenever and wherever the customer chooses
- Quickly fulfill information requests with accurate, up-to-date data



NexJ CRM for Tablets provides the following workspaces with the optimal level of functionality and interactivity:

Contacts

- **Search** – quickly search across all contacts, households, and companies
- **Contact & Household Profiling** – review and update a complete customer profile including a banner of key demographic information, biography, relationships, notes and conversations, custom fields and categories
- **Relationship Hierarchy** – understand a contact's important relationships, including households, companies, and spheres of influence
- **Interaction History** – review a history of all interactions including phone calls, meeting and tasks. Filter the view, edit details, and drill down for more information
- **Portfolio** – review details of accounts, back-end holdings, transactions, and policies
- **Quick Notes** – efficiently record and share customer information and call notes
- **Leads** – view leads related to a specific contact
- **Opportunities** – view opportunities related to a specific contact

Schedule

- Select from daily, weekly, or monthly schedule views
- View and edit schedule items for one's self
- View and assign schedule items for other team members

Tasks

- View a list of all tasks, filtering by the appropriate criteria, and tap to view more details
- Create, edit and assign tasks
- Track progress on tasks delegated to other users

Conversations

- View a list of conversations by topic, as well as the individual messages within each topic
- Send and receive conversations about a contact with other users of NexJ Contact
- Collaborate with other users about records such as opportunities, service requests, etc.

Leads

- View all leads in the system, filter by desired criteria, and edit as appropriate
- Convert the lead and create a related opportunity from an existing template

Opportunities

- View all opportunities on interactive dashboards that can be filtered by description, stage, or other metric
- Drill down to view and edit details, and view related activities and documents

To learn more about NexJ CRM for Tablets, visit www.nexj.com or email info@nexj.com



NexJ Systems Inc.

10 York Mills Road, Suite 700,
Toronto, Ontario M2P 2G4

P: 416 222 5611 F: 416 222 8623
info@nexj.com www.nexj.com

About NexJ Systems

NexJ provides enterprise customer management solutions to the financial services and insurance industries. Our solutions, which integrate information from multiple systems into a unified view, include industry-specific customer relationship management (CRM) to enable collaboration across countries, regions and teams; customer process management (CPM) for client onboarding with KYC and AML for regulatory compliance; and customer data analytics & intelligence (CDAi), which enables augmented intelligence to better understand, sell to, and service customers.

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