



openCRX

Enterprise Class Open Source CRM

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What is openCRX?

- openCRX is an **Open Source Standard Solution for CRM** (CRM = Customer Relationship Management)
- openCRX is highly **interoperable** and **easy to integrate** with existing applications (→ protect your previous investments)
- openCRX is **component-based** and therefore **easy to extend**
- openCRX is **customizable** so that it fits your particular needs
- openCRX is **multi-entity enabled** and **highly scalable**
- openCRX is **secure** (e.g. suitable for financial institutions)
- openCRX is **platform-neutral** (various deployment scenarios)
- openCRX is **vendor-independent**

Some Facts and Figures

- Project launch in August 2004
- ~ 2'500 downloads per month
- ~ 30 partners and contributors world-wide
- ~ 3 releases per year
- Figures of known systems in production:
 - > 1 Mio. accounts
 - > 1 Mio. activities
 - > 1 Mio. contracts
 - > 100 concurrent users
- Funding
 - Feature accelerations
 - Feature contributions
 - Human resources

Functions

- Account and Contact Management
- Sales Process Management and Controlling:
Leads, Opportunities, Quotes, Orders, Invoices
- Product Management
- Incident and Activity Management
- Facility Management
- Document Management
- Access control at object level
- Audit trail for all data
- Multi-currency support
- Multi-language support (17 locales)

Account Management

- Different types of accounts: **contact, legal entity, group, unspecified account**
- All accounts can have unlimited number of **addresses**
- Management of complex **organizations**
- Powerful, **user-definable** account and address **filters** allow easy definition of marketing campaigns
- Real-time access to involved activities and contracts

Activity Management



- Highly advanced and customizable **Activity Creators**
- Powerful and generic **Activity Filters**
- **Project Management**
XML-based importer/exporter for MS Project (under development)
- **Calendar Management** for activities and resources
- **Resource Management**
- **Work Effort Reporting** (suitable for billing)
- Generic and user-definable **Activity Processes**
Example: Bug tracking process

Product Management

- Advanced **Price and Price List Management**
- **Management of structured, complex products**
- Automatic generation of **derived prices**
- Powerful and generic **Product Filters**
- **Pricing rules:** allocate appropriate price to any given pair account/product

Flexible Customizing

- openCRX is extremely flexible and can be customized in the following areas:
 - **UI customizing:** perspectives, forms, layouts, labels, locales, colours
 - **Wizards and Reports:** user-defineable functions can be added as wizards and reports. The operations have access to the full openCRX API.
 - **Business Logic:** The API / model can be extended. Business logic can be added.

Interoperability

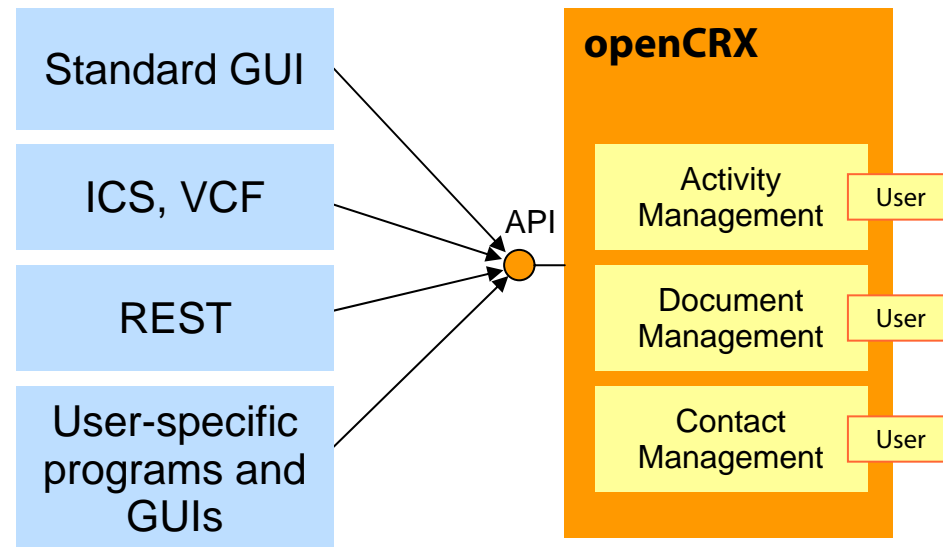


Access all openCRX functions using standard browser

ICS, VCF clients, e.g. Sunbird, Chandler, Outlook, ...

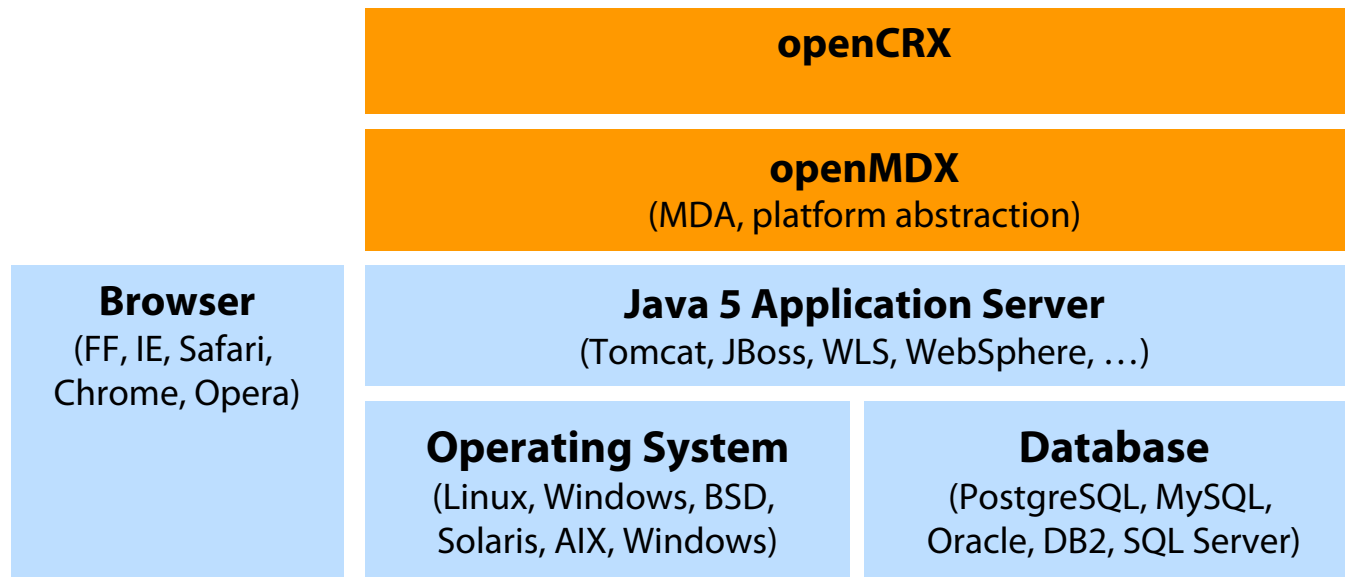
REST service allows access to full API

User-specific Programs and GUIs can easily be added



- All functions can be accessed via the API
- openCRX offers out-of-the-box frontends, e.g. Standard GUI, ICS, VCF and REST service
- User-defined frontends (e.g. Store) can be added easily
- Business logic can be extended with user-defined plugins

Platforms



openCRX is a highly scalable CRM-Suite that runs on all widely used platforms. Changing the platform does not require any changes to the application layer.



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