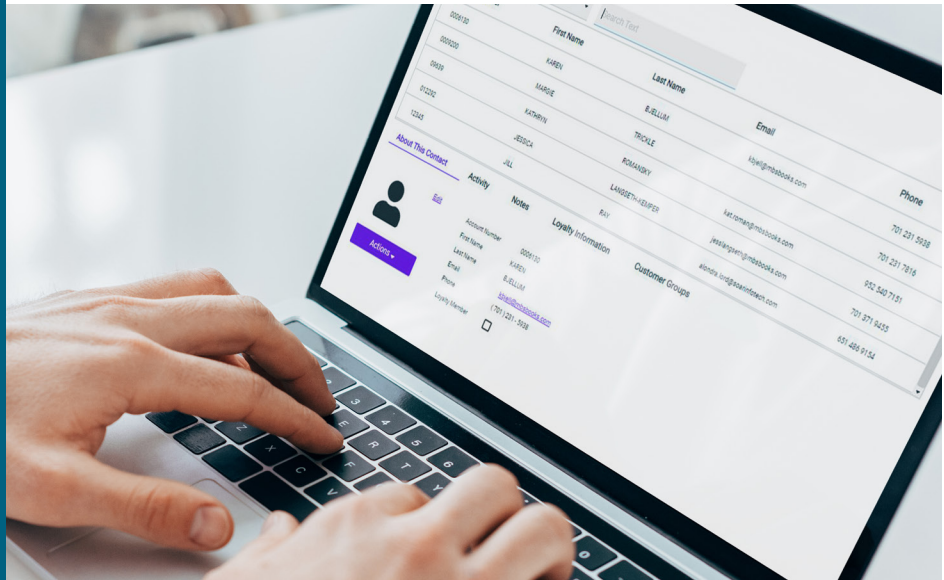


# Customer Relationship Management (CRM)

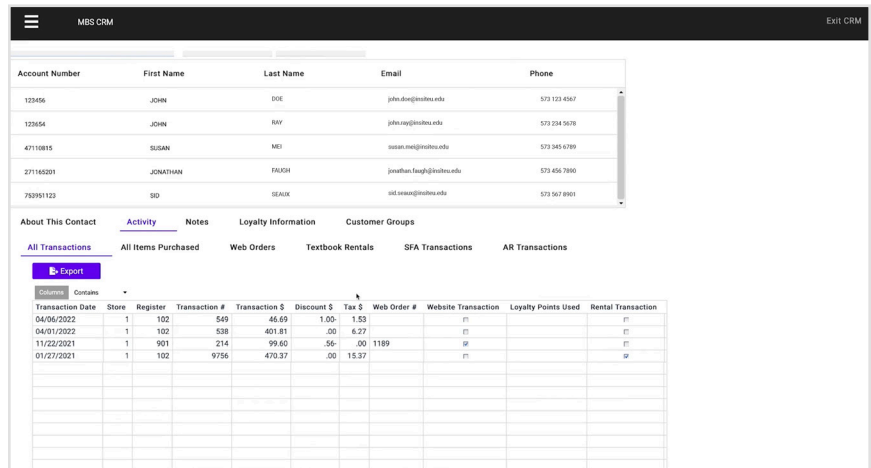
## THE ADVANTAGES

- Look up transactions by account number, name, email address and phone number
- Includes transactions from multiple store locations, registers and the store's eCommerce site
- Review and edit contact information
- Personalize marketing with easily extractable data
- Look up all transactions for a customer regardless of how they paid
- Quickly locate the information you need with intuitive search and filtering options
- Export, email and/or print any information
- Simplify importing customer information from the campus system to update the Customer Master



With MBS Customer Relationship Management (CRM), stores can analyze and interact with customer information to improve customer service, marketing efforts and utilize detailed reporting. College stores can take control of the customer relationship and better compete in a competitive market.

## PROACTIVE CONTROL OF THE CUSTOMER RELATIONSHIP



Account Number	First Name	Last Name	Email	Phone
123456	JOHN	DOE	john.doe@mbsou.edu	573 123 4567
123654	JOHN	RAY	john.ray@mbsou.edu	573 234 5678
47118815	SUSAN	MEI	susan.mei@mbsou.edu	573 345 6789
271160291	JONATHAN	FRUSH	jonathan.frush@mbsou.edu	573 456 7890
783951123	SID	SEALK	sid.sealak@mbsou.edu	573 567 8901

Transaction Date	Store	Register	Transaction #	Transaction \$	Discount \$	Tax \$	Web Order #	Website Transaction	Loyalty Points Used	Rental Transaction
04/06/2022	1	102	549	46.69	1.00	1.53		IT		IT
04/01/2022	1	102	598	401.81	.00	6.27		IT		IT
11/22/2021	1	901	214	99.60	.56	.00	1189	SP		IT
01/27/2021	1	102	9756	470.37	.00	15.37		IT		SP

CRM puts all the customer information you need for more efficient assistance and marketing in an easily accessible format. This powerful tool provides stores with multiple methods for retrieving information, such as basic account information, transaction activity from POS and eCommerce,

customer codes, loyalty, and more. When a customer needs assistance, CRM is a fast, simple way to access all the information you need to help them.

Find transactions with easy lookup by account number, name, email address and phone number. Store associates can quickly view and update customer information (including loyalty member status or changes in contact information).

Proactively connect with customers through unprecedented access to customer and transactional information. Through integrated Customer Master

file updates from the campus system, CRM includes the relevant customer information so your store can proactively reach more potential customers, including all potential student customers. Email new students every term to welcome them to campus and remind them to purchase their materials from the store.

From efficiently helping in-store customers to creating targeted messaging by identifying customers who purchased specific items during a sales event, CRM is a total solution that helps you elevate your store's customer service.

The screenshot displays the MBS CRM interface. At the top, there is a navigation bar with a hamburger menu icon, the text 'MBS CRM', and an 'Exit CRM' link. Below the navigation bar, there is a search section with a dropdown menu for 'Select Search Type' and input fields for 'Last Name' and 'First Name'. The main content area is divided into two parts. On the left, there is a table with columns 'Account Number', 'First Name', 'Last Name', 'Email', and 'Phone'. The table contains five rows of customer data. Below this table, there are sections for 'About This Contact' and 'Activity', each with an 'Export' button. On the right, a 'Transaction Information' modal window is open. It displays transaction details such as 'Date: 4/06/22', 'Store: 001 TRAINING ACADEMY', 'Register: 0102', and 'Transaction: 0549'. Below the details, there is an 'Export' button and a table with columns 'Item', 'Description', 'Logo', 'Color', 'Size', 'Quantity', 'Extended \$', 'Discount \$', 'Promo', 'Returned', and 'Serial'. The table lists several items with their respective quantities and prices. At the bottom of the modal, there is a 'Close' button.

### Transaction Detail

You can quickly locate the information you need. Simply filter and sort the data to find the specific information you are looking for and export the information with a

click of a button. Additionally, you can take a deeper look at any of the transactions listed, including any promos used on a transaction, SFA or AR tender detail and customer loyalty information.

**Tender Information**

Transaction Date: 4/06/22      Store#: 1 TRAINING ACADEMY  
 Register#: 102      Transaction#: 549  
 Transaction Amount: \$46.69      Transaction Voided:  
 Discount Amount: \$1.00      Contains Rental:  
 Transaction Code: TAXABLE SALE      Web Order:  
 Sales Person: 11111      Web Order Number:  
 AR Invoice Number:      Tax Exempt ID: 0

**Tender Details**

Tender Amount	Description	Tax Table	Tax Amount
\$46.69	CASH	Tax Table 1	\$1.53 SALES TAX 1
\$0.00		Tax Table 2	\$0.00
\$0.00		Tax Table 3	\$0.00
\$0.00		Tax Table 4	\$0.00
<b>Tender Total</b>		<b>Total Tax</b>	<b>\$0.00</b>

**Display tender information:** Improve customer service with easy access to the information you need to answer any questions about past purchases a customer might have. If a customer needs a record of their purchases over the past year, simply lookup their transactions for the filtered date range and export the file.

**POS Journal Viewer**

MBS Training Store  
 2711 W Ash St.  
 Columbia, MO 65203  
 555-555-5559

Store Hours: Mon-Fri 8:30 am - 5:00 pm

Check out our Online Store

SALE  
 STORE:00001 REG:102 TRAN#:0549  
 CASHIER:GLOBAL M  
 SALE  
 Customer ID: XX3654  
 JOHN  
 DOE  
 JOHN.DOE@INSITEU.EDU  
 MBS Points#: XX3654

MBS Points Member  
 HOODIE ZIP PROMO  
 20017869100300104 T  
 (1 @ 15.00)      15.00  
 BRUSH KOWALSKI 85

**Review receipt information:** See the POS journal detailing the transactional information. You can email or print this information or use it for detailed research.

## MORE WAYS CRM STREAMLINES CUSTOMER SERVICE

### View all items a customer has purchased from your store

View and filter the complete list of items purchased from your store.

### Review a customer's web orders

Quickly see the web order subset of transactions to help you quickly find the information you are looking for. The inSite web order number is also extended here so you always have that information at your fingertips.

### Quickly locate textbook rentals

View all of the students' textbook rental activity and email or print information for the student.

### See all the student's SFA transactions

All the student financial aid transactions are listed along with the transactional detail for those transactions. See the item's cost, tax and how much SFA covered.

### Review any of the AR transactions for a customer

See the AR invoice or ticket number listed along with the product description, quantity and cost.

CRM is designed to make it simple to research activity for any contact who purchased from the store. You can also read any notes on the account or add one, review customer loyalty information, and manage customer groups that help your store engage customers with targeted marketing campaigns.

## BETTER COMPETE WITH TARGETED MARKETING

MBS CRM provides you with the data elements you need to filter and extract data to help your store better personalize customer marketing through a targeted approach.

CRM includes easy access to common reports. In addition, you also have access to our flexible report builder that allows you to filter data to the specific subset of customers that you would like to target in your marketing efforts and allows you to select the data elements you would like to include in the report.

Perhaps, your campus is having an alumni event. By utilizing customer groups, you can advertise to alumni and send them a coupon to use that weekend. You could even further target the campaign by looking at the specific purchases alumni have made both in-store and online. Include like items in your messaging to tempt those customers back into the store. The possibilities for how you can use the information available to you through CRM are practically unlimited.

Once you have the information you need, simply export the data to your preferred marketing platform and you are ready to launch your marketing campaign. By exploring the wide variety of data available at your fingertips through CRM, you can easily identify, plan and implement a strong marketing strategy.

MBS Store Technology Solutions' total store system includes CRM at no additional charge.