Free Rein

SuiteCRM - Customer Relationship Management

Service Definition

Contents

1 Introduction

SuiteCRM a comprehensive and adaptable open-source CRM system that allows you to take control of your client data, workflows, reporting and much more. It can be self-hosted or used in a cloud environment.

Being open-source keeps costs down but SuiteCRM still allows tremendous control of the core features and generous scope for custom and personalised modules to extend the system in many, many directions. It has a clear roadmap and allows extensive customisation.

We start with an "out of the box" system which we will work with you to define ideal changes to fit your working processes and data capture needs. Appendix A shows the standard modules and a few examples of modules Free Rein has developed to specifically support Local Enterprise Partnerships, Growth Hubs and Government funded projects.

2 Company Background

Free Rein is a Suffolk based technology agency, bringing a wealth of creativity and expertise to website developments, email marketing campaigns, app development, search and social media marketing and much more.

By combining in-house talents with strong customer care and project management, Free Rein delivers projects on time, on budget and matching customer requirements.

Having established itself as one of the East of England’s leading technology agencies since its formation in 2004; Free Rein has worked with a wide range of local, national and international organisations, across multiple sectors, on a number of varied and challenging projects.

Free Rein prides itself on being able to offer solutions for private, public and not-for-profit organisations, understanding requirements and delivering results at every level.

We work with a variety of specialist partners ranging from design and marketing agencies, through HR and personal development to large multi-national organisations. This allows us to deliver projects from a well-informed team with skills and knowledge directly relevant to the client.

2 Example Uses

Sales Force Automation:

- Lead, contact, and opportunity management to pursue new business, share sales information, track deal progress, and record deal – related interactions
- Account management capabilities to provide a single view of customers across products, geographies and status
- Dashboards to provide real-time information about leads, opportunities and accounts

Marketing Automation:

- Lead management for tracking and cultivating new leads
- Email marketing for touching prospects and customers with relevant offers
- Campaign management for tracking campaigns across multiple channels
- Campaign reporting to analyse the effectiveness of marketing activities

Customer Support:

- Case management to centralize the service history of your customers and monitor how cases are handled
- Bug tracking to identify, prioritize and resolve customer issues
- Optional Web Portal for clients/customers

Collaboration:

- Activity management for emails, tasks, calls and meetings

Administration:

- Edit user settings, views and layouts quickly in a single location
- Customize the application in Studio to meets the exact needs of your organization
- Create custom modules in Module Builder

Supply Chain:

- Free Rein extended API to support comprehensive web portal
- Allows consumers and suppliers to take moderated control over some of their CRM data
- Uses predefined SuiteCRM reports
- Lavarel based web portal

3 What is included

An annual fee is charged to cover use of the code, hosting and support. The support includes unlimited telephone or email user support available during office hours. We anticipate that you may require greater user support in the early months while your administration team is becoming familiar with the extensive range of features. For this reason, Free Rein does not cap any support, preferring rather to address any root issues that are causing difficulties.

4 Response Times

Customer Care is one of the prime values of Free Rein. We aim to be responsive to any customer problem and proactive in addressing threats and weaknesses. Our standard contracted response times are;

Working Hours: Within 2 hours
(Monday to Friday excluding bank holidays from 9:00am to 5:00pm)
Outside above hours (Contracted): Within 6 hours

Hosting is monitored automatically and you will not need to keep any check on your site.

If your service is considered business critical and you need increased cover out of hours, please speak to us and we can build additional response levels to meet your needs.

Appendix A

A.1 SuiteCRM Modules – Out of the Box

Section	Usage
Accounts	Created from a converted Lead. The standard Suite fields have been extended and dropdown lists changed. Largely Organisation based once active engagement
Bugs	For submissions and management in a support desk environment
Calls	Booking, reminding, assigning and recording detail of calls to be made
Campaigns	Clustering activity, identifying budgets and connecting with target lists
Cases	Once a Lead has been converted the Case is created and assigned to a delivery partner.
Contacts	Created from a converted Lead. A Contact must be attached to an Account.
Contracts	Recording and reminders for renewals associated, generally, with Accounts though can tag to Contacts as well.
Documents	As it says on the tin
Email Templates	SuiteCRM can generate emails for campaigns and events
Emails	Sending emails in a campaign or day to day. Also used for saving incoming emails through Outlook Add-in developed by Free Rein
Employees	Greater details attached to user records where they need access to data
Events	Used in conjunction with locations to set up an event, budget, venue and then on to invitations. Option web interface for acceptance.
Invoices	Generated from Orders and Product modules
Knowledge Base	A wiki within the CRM – help with processes, guides and internal FAQ
KB Categories	
Leads	Currently the starting point for programme activity once you engage.
Line Items	Part of the order and invoicing modules
Locations	Support for the events module
Map Address Cache	

Section	Usage
Map Areas	Custom mapping module submitted by one of the expert partners which has now been integrated for everyone. Shows where your clients cluster and much more.
Map Markers	
Maps	
Meetings	As with calls, recording, assigning and noting meetings
Notes	Annotations and files relevant to each Account.
Opportunities	Tagged against Accounts to set targets and monitor responses
PDF Templates	Can we used to compile letters and reports
Products	Linking in with Order and Invoices. Also connects to Account as list of products and services that client has purchased.
Product Categories	
Project Task Templates	Project planning and management modules helping define templates, resources and tasks.
Project Tasks	
Projects	
Quotes	The start which then migrates to Orders and Invoicing
Reports	Extensive reporting module
Scheduled Reports	
Security Groups	Expanding the Roles and Policies of users as groups. Drills down to every single item in the CRM
Security Group Management	
Spots	Option for each user's dashboard to show tables, graphs, heatmaps and much more of CRM, user and department performance
Surveys	New module with extensive options.
Target Lists	Grouping for an event, campaign etc that can include Targets, Leads and Contacts
Targets	Lists of people and businesses that you want to, at some point, engage with.
Tasks	If it isn't a meeting or a call but needs to be set and perhaps assigned to other users – tasks.
Users	Used for access control
Workflow	Once we know an event has taken place it can kick off a workflow
SuiteCRM API	Allows interaction with other systems

A.2 Example SuiteCRM Custom Modules and Tweaks from Free Rein

Timesheets	Records each interaction event and connected to Cases
ERDF Claims	Contains information about the Claims and their progress
Timesheets	Built to connect to a Case/Support item so that each event can be recorded and a time allocated. Our ERDF Claim module then, as example, checks on total time, matched to Output targets and then alert emails generated and claims monitored
Engagement Date	Tags the first date a business is engaged and matched to Euro exchange rate for ERDF programmes
SIC / NAICS Codes	Complete look up and auto complete
Address	Links with Google for correct postal code
Outlook Add-in	Matches Outlook email addresses to SuiteCRM records to save emails to CRM
Grants	Manage application and flow of Business Support Grants. Variations for amendments or extension and then monitoring the claims, payments and matching contributions month on month.
Grants Variation	
Grants Claims	
Supply Chain Products	Developed for the "Return to Work" following Covid lock down, these modules connect directly to Accounts and can be accessed through a web portal for Supplier update and Consumer search – covering all B2B products, Materials and Services.
Supply Chain Services	
Extended API	To support remote interrogations and Web Portal client services