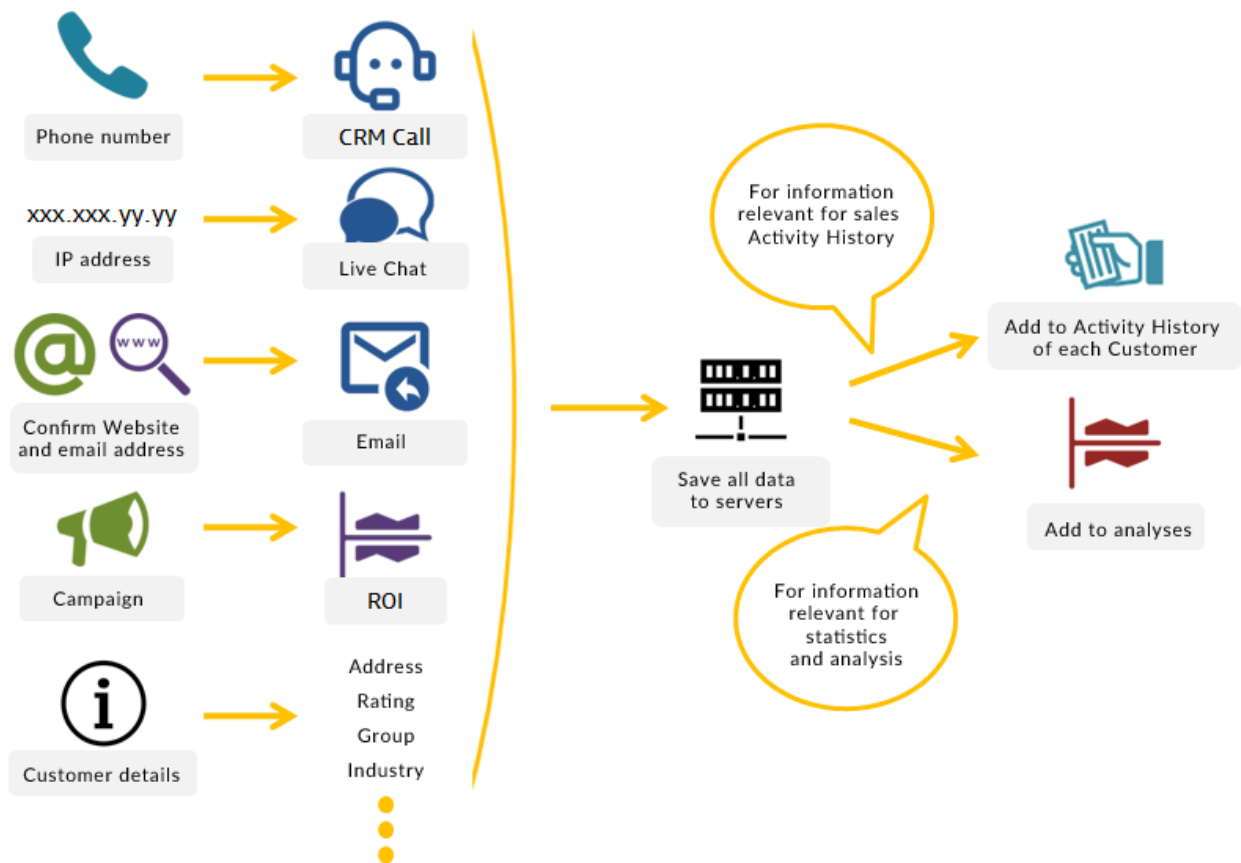# Moffice Customer Details Page

Introduction

The first CRM systems were basically rolodexes on which salespeople would note phone numbers and names for clients. Thankfully, we've come a long way since then. Keeping track of Customer information and records is the most integral feature of a modern-day CRM. With MofficeSuite, you'll get a detailed profile page for each Customer with every interaction listed. Adding information is also both manual and automatic to help speed data entry along. Let's take a look at what Moffice CRM keeps track of and how users can utilize the information.
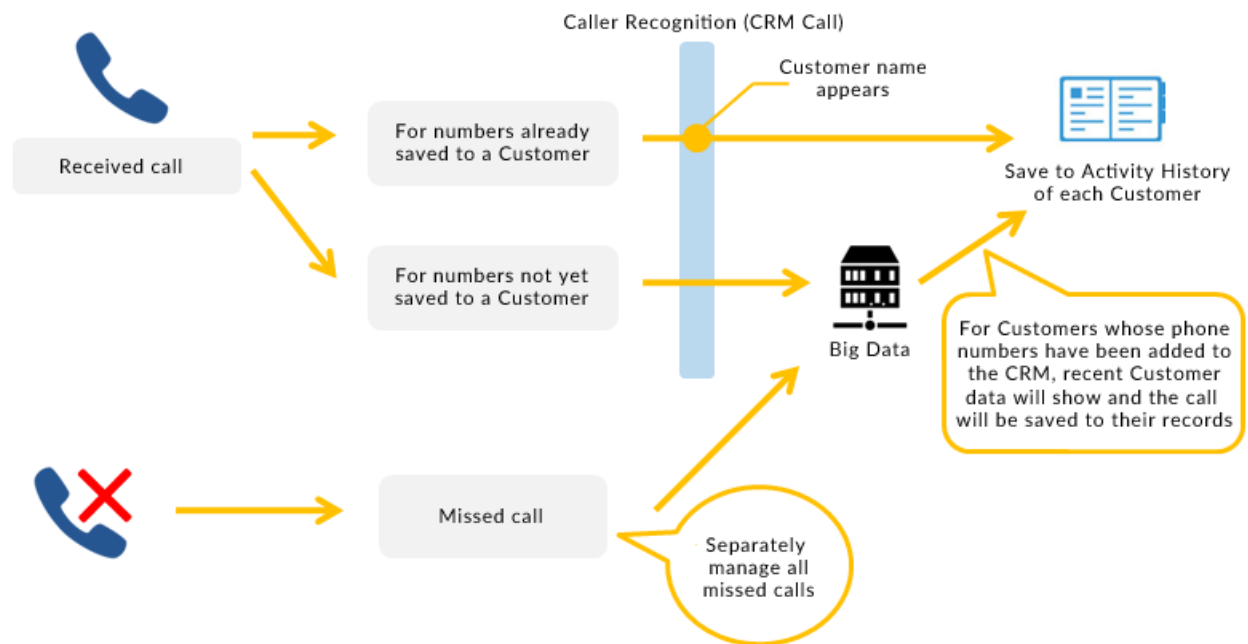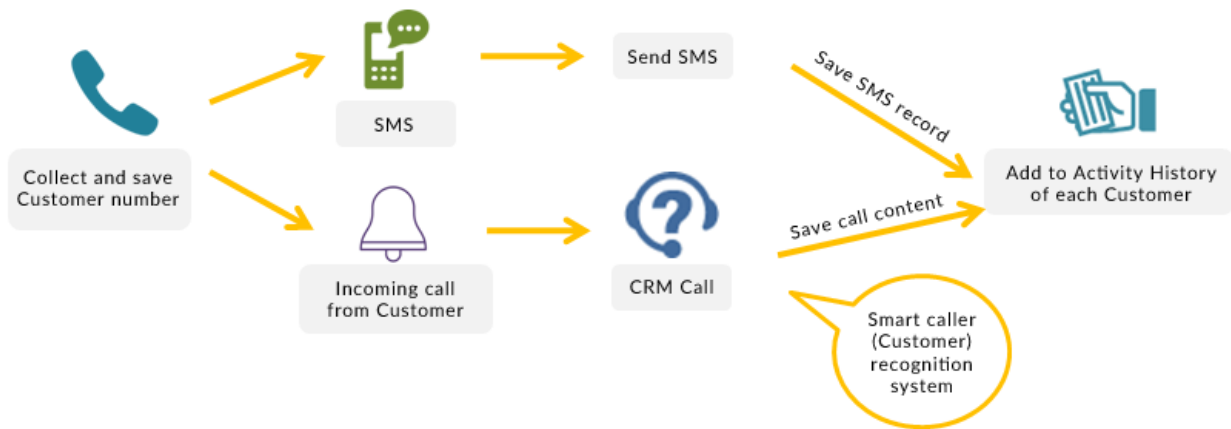
Here's an outline of the types of essential data gets recorded and where it leads. With detailed tracking and analyses, you'll know everything about your Customer with the touch of a finger and gain deeper insights about them with new discoveries.
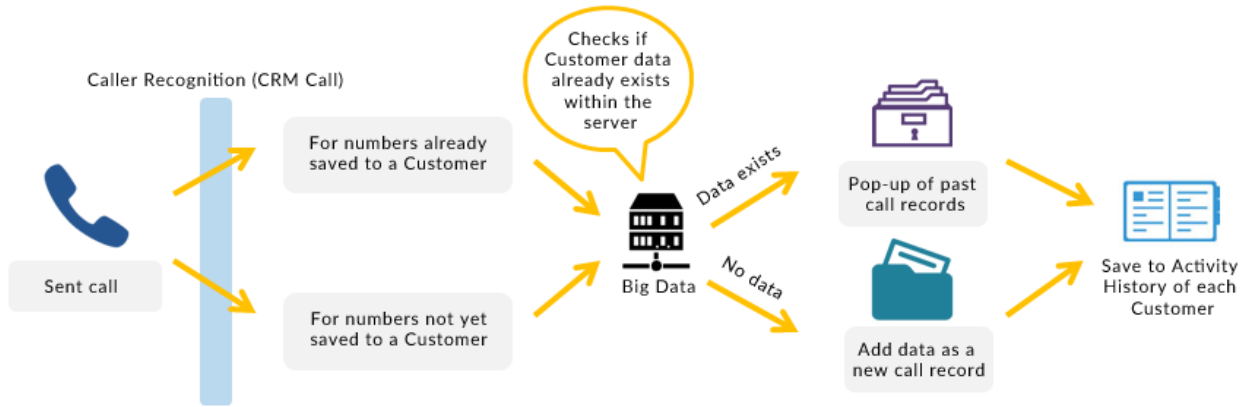
Phone Number

Moffice CRM plays a vital part of data collection for phone calls, fax numbers, and SMS messages.

For customer service representatives with a Customer's phone number, you'll get their information as it pops up on your screen when answering with an Internet phone from our CRM Call caller recognition program. You'll also be able to add data right through the program and type information as you talk on the phone for the most streamlined data entry. Likewise, you can always review missed calls later in the Activities menu.
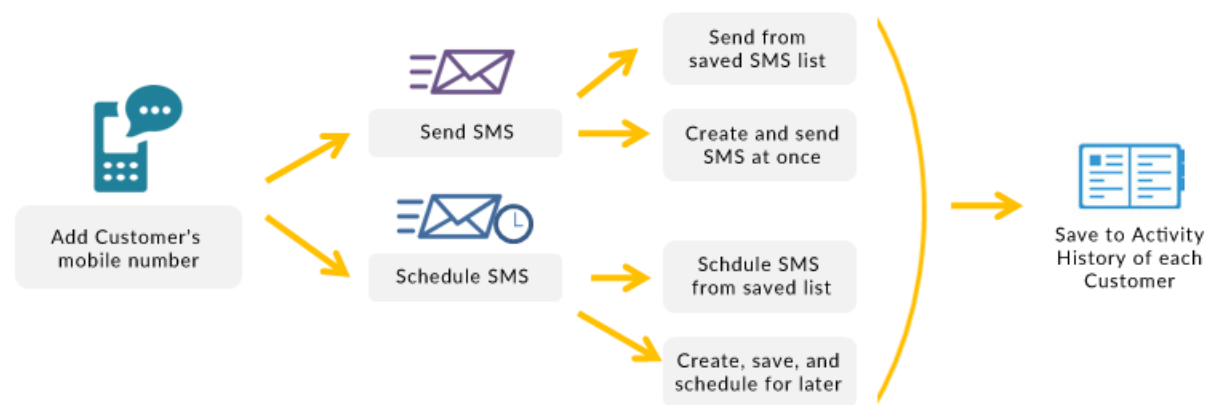
Fax Numbers

Moffice CRM allows you to save drafts and send faxes for Customers and have the data add to their Activity History for fast and automated data recording.
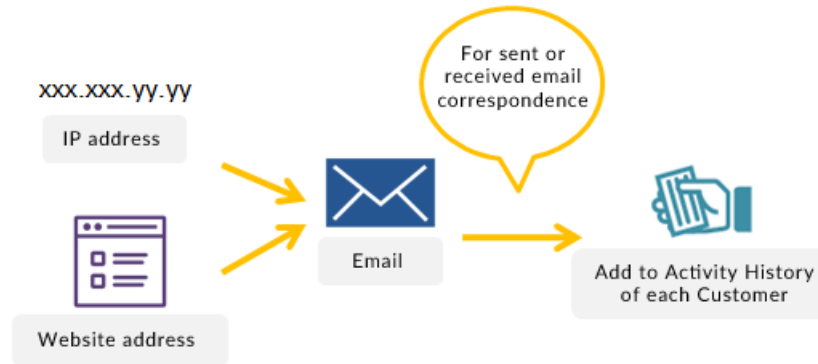

SMS Messages

With a Customer's mobile number, you can send SMS messages immediately or later and save the data to their Activity History for fast and automated data recording.
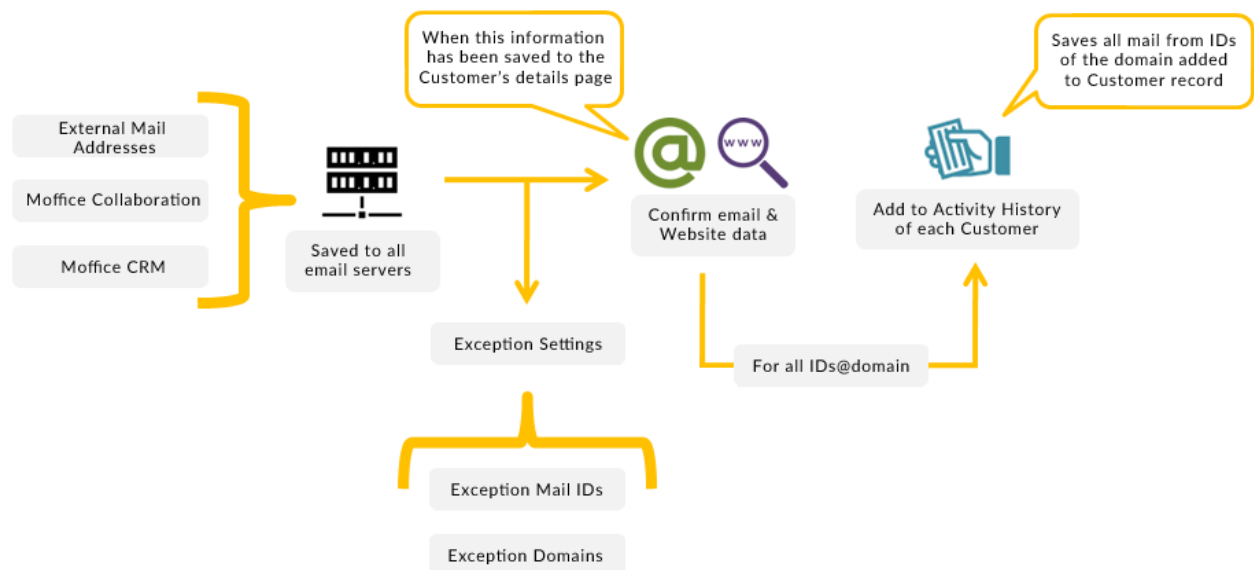
IP Addresses

Add Customer IP addresses so their visits to your Website or Live Chat are automatically recorded into their Activity History.

Email & Website

Email

Confirm a Customer's email address domain or Website and emails from that domain and address will automatically register as email records. You can likewise add other external mail addresses or remove exception mail IDs and domains to and from email records. In the Customer's details page, you can view all these email logs in the Activity History column.

How Statistics & Analyses are Created

Statistics and analyses are obtained through some additional information in a Customer's details page. They are explained in the following pages.

Customer Addresses

Customer Addresses are useful when initiating direct mail marketing campaigns. You can sort address and print labels for selected addresses in commercial or catalog envelope formats. Use data from address geography to learn more about your Customer demographic and the regions in which they live.
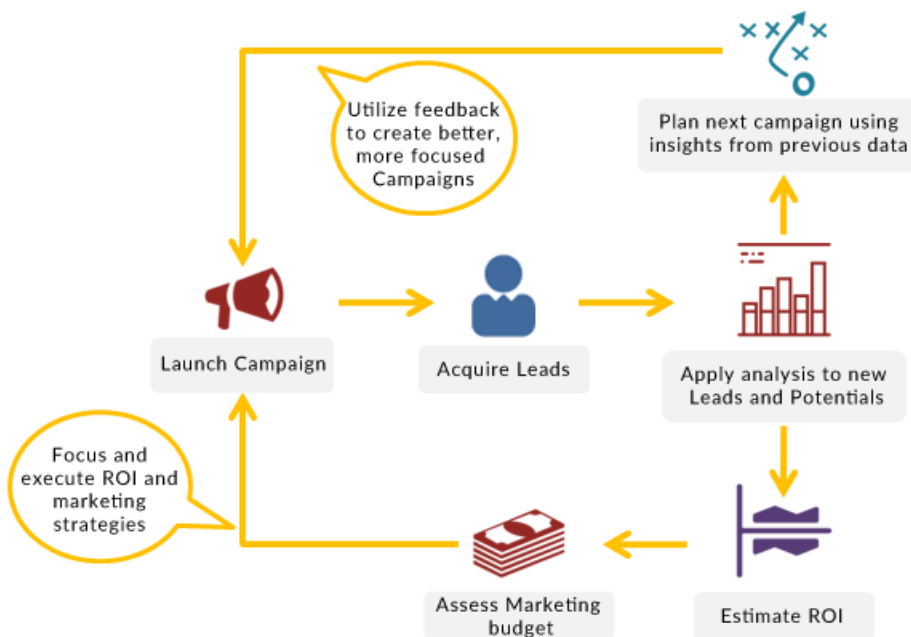
Related Companies

Related companies help predict the success/failure rate of conversion for another company or individual Potential or Lead. Use this information to see best and worst practices for your business and better prioritize Customers that will affect others in your CRM system.
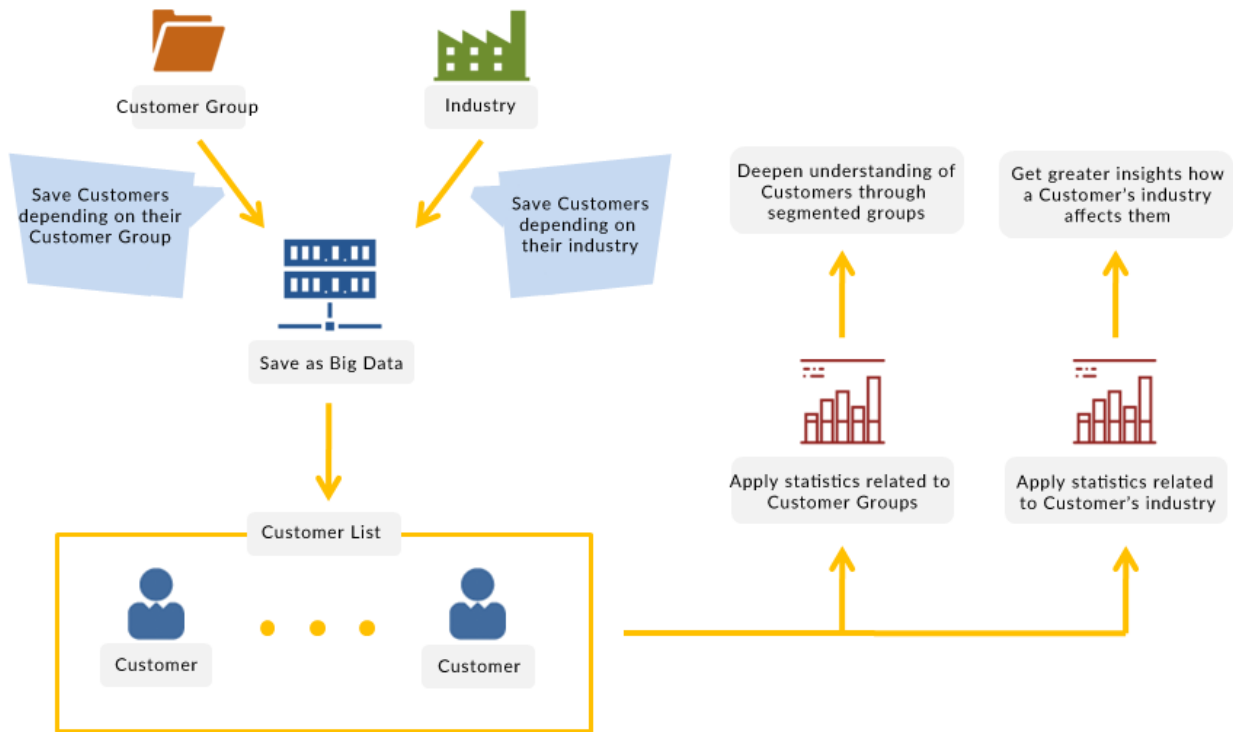

Marketing Campaigns

Insert which campaign the Customer came from to better calculate marketing return on investment (ROI). With continuous data input, your marketing campaigns will upgrade to maximize your budget and lead acquisition every time.

Customer Groups & Industries

Use information about a Customer's Group or Industry to learn more about that type of Customer segment and how to utilize that information for greater sales efficiency and ROI.

Resellers

Add Resellers to Accounts for better supply chain management. Take note of the activities that they engage in with other companies and individuals and view statistics such as conversion rate to evaluate the effectiveness of each Reseller.