

## Xsdot CRM & financial services

Xsdot's application server contains standard CRM and financial services that can be extended with custom made services to develop or implement a complete solution.

Xsdot CRM and financial services are primarily used in CRM, eCommerce, Internet sites and Security & authentication solutions.

More information about Xsdot [CRM & financial applications](#) can be found in the Xsdot [occupations](#) section.



### CRM user groups

The CRM user groups are used for instance to define management groups, customer groups and employee groups. User groups can be freely created and structured in Xsdot's applications and are further used in other Xsdot services like eCommerce, Financial services and Content management.

### User information & settings

After a user is authenticated on a site, the user can review and maintain his own information and settings online. One can think of company, shipping and invoice addresses; user, mailing, community and e-commerce settings.

### Online support and mail services

This service enables a customer or relation to request support tickets online, an administrator or employee can reply to the requested support items. All support items are emailed to both parties and are stored in a database for further processing.

### Project services

Xsdot project services enable businesses or administrators to define projects and store project related documents or files like offers, contracts, architects in a database. A customer or relation is enabled to access project files online after authentication.

### Agenda & appointment services

Agenda services are used to make appointments with customers and relations. The customer or relation is enabled to view its appointments online after authentication. Furthermore the appointments are posted by email

or the administrator can print appointments on paper and post them. By using Xsdot's eMail and SMS services the relations can also be notified / reminded.

### **RMA services**

RMA (return merchandise authorization or return material authorization) is a transaction whereby the recipient (customer or relation) of a product or service arranges to return defective goods to the supplier. The RMA procedure is stored in a database and the handling is fully automated online.

### **Xsdot financial services**

Xsdot financial services are primarily used in CRM, eCommerce and financial solutions. Also check [Xsdot eCommerce components](#) for more financial services.

### **Invoice administration**

Xsdot's invoice administration module is a complete online invoice system that is used by administrators or by Xsdot's eCommerce system to store and create invoices. After authentication a customer or relation is able to review, download and pay invoices online. Xsdot's invoice administration system has many functionalities for managing invoices and contains many printing services to print envelopes, invoices, labels and more.

### **Offer administration**

Xsdot's offer administration module is a complete online offer system that is used by administrators or by the Xsdot eCommerce system to store and create offers. After authentication a customer or relation is able to review, download, accept, reject and pay offers online. Xsdot's offer administration system has many functionalities for managing offers and contains many printing services to print envelopes, offers and labels.

### **Online payment services**

Xsdot online payment services enable a customer or relation to pay invoices or offers online by using online payment service providers (credit cards, iDeal, etc.).