Enquiry management

Introduction

The Workspace enquiry management module provides the tools required for your commercial team to create, track and manage bids and opportunities. The Workspace actions system ensures that your teams follow up opportunities and actions effectively. An enquiry summary on-screen gives full management visibility of your pipeline of prospects with the ability to drill into full details as required.

Main features

- Tracks opportunities from initial enquiry through to won or lost using specifically defined status fields.
- Allows unlimited categorisation of enquiries through user defined fields and the Workspace form builder.
- Links external contacts and internal teams to the enquiry record.
- Provides a view of all the enquiries an individual has had involvement with.
- Integrates with the template system to automatically create merged documents for the chosen enquiry.
- Integrates with document management to provide a virtual document store for the chosen enquiry, contact or organisation.
- Allows recording of key quote figures against the enquiry.
- Action system allows logging, delegation and expedition of company defined action types.
- Allows the basic Project record to be automatically created when an enquiry is secured. A link is then maintained between the records allowing simple tracking back from won job to original enquiry.
- A search facility provides summary of all enquiries by value, status, region, manager etc.

Who uses it?

Most Workspace users take advantage of this standard module, replacing existing enquiry tracking systems that either lack project focus, are poorly integrated, have no document management facilities or struggle to provide a single view of all corporate opportunities. This often becomes the first module of the system to be implemented, involving the commercial teams in the business and providing a natural progression as enquiries turn into projects.