

The SDM Customer Relationship Management Module allows housing organisations a quick view of the main tenant and property information when answering customer queries either over the telephone or face to face.

The SDM Customer Relationship Management Module provides staff with an overview of a customer's recent interactions with the organisation.

Key Information

Tenant Details

- Tenant Name Details
- Contact Telephone Numbers Details
- National Insurance Number Details
- Email Address Details
- Tenant Account Enquiry
- Tenant Diary Details

Property Details

- Property Address Details
- Manager Code Display
- Management Area Display
- View of Works Orders

Main Features

- Ability to update basic tenant information on main display
- Drilldown to Tenant File Maintenance
- Property Address Information Display
- Drilldown to Property File Maintenance
- Tenant Account Enquiry Display
- Shortcut to printing Tenant Rent Statements
- Drilldown to Tenant Account Enquiry
- Tenant Diary display
- Drilldown to Tenant File Diary Maintenance
- Current / History Works Order Display
- Drilldown to Works Order Details
- Shortcut to creating new works orders from CRM screen

Integration

The SDM Customer Relationship Management Module integrates with:

- Rents & Housing Management Module Tenant and Property Databases
- Repairs and Maintenance Works Order Database
- The System can also be integrated with TAPI – Telephone Application Protocol Interface

