Customer Relationship Management (CRM)

Manage your customers' details in Syntelate XA or in an external customer relationship management system – whatever suits your business.

In Syntelate XA, you can freely define the information that you want to hold about your customers. Add whatever fields you wish, to capture whatever data you want. You can also migrate your customer data to Syntelate XA from another system.

But maybe you want to continue using your existing CRM system to manage your customers' details. That's no problem: Syntelate XA can integrate with other CRM systems.

Your data universe

One of the first things you'll do in Syntelate XA is define your data "universe". This tells Syntelate XA where all your data is stored. If your customer details are stored in a separate CRM system, it's here that you'd define that.

Once you've defined your universe, your designers simply don't have to worry about where your data comes from.

Let's say a designer wants to add a customer forename field to a data entry element – the designer simply selects that field from the list of fields in your universe. It doesn't matter to the designer whether the field is in your Syntelate XA database or your external CRM system.

Once you've set up your data universe, Syntelate XA does all the hard work for you, reading data from the correct place and writing data back to the correct place. This leaves your designers free to focus all their attention on what they should be doing: designing the best desktops for your agents and writing the most helpful scripts for your agents.

Our CRM solution is part of Syntelate XA, our omni-channel customer engagement suite. You can select this product individually or pick and mix from the full suite to fit your customer service strategy.

Speak to the team to learn more.