

CRM - Features

Automation

- Lead Management
- Account & Contact Management
- Opportunity Management
- Sales Quotes

Customer Support & Service

- Trouble Tickets
- Knowledge Base
- Customer Self Service
- Online Knowledge Base

Marketing Automation

- Campaign Management
- Mass Mailing
- E-mail Templates
- Mail Merge Templates

Inventory Management

- Products Catalog
- Price Books
- Vendor Management
- Purchase Orders
- Sales Orders
- Invoices

Activity Management

- To Dos, Meetings & Calls
- Recurring Events
- Shared Calendar
- Activity History
- E-mail Notifications
- Notes

Reports & Dashboards

- Key Metrics
- Customizable Reports
- 20 Pre-built Reports
- 20 Pre-built Dashboards
- Report Folders

Product Customization

- Custom Fields (10 different data objects)
- Pick Lists
- Custom List Views
- Drag & Drop Modules
- Currency customization

Security Management

- User Management
- Profiles
- Roles
- Groups
- Organization-level Access Control

Automation Key Modules

CRM supports the sales process of an organization, and it contains Lead Management, Opportunity Management, Account & Contact Management, Sales Pipeline Management, Sales Forecasting, Sales Analytics, customer support, and others.

- Lead Management
- Opportunity Management
- Account Management
- Contact Management
- Activity Management
- Reports & Dashboards
- Product Customization

Lead Management

- Manage leads end-to-end (from creating leads to converting them into opportunities)
- Capture leads directly from your Web site and transfer to CRM
- Customize online lead form as per your organization requirements
- Import leads from external sources, such as Web downloads, trade shows, seminars, direct mail, and other types of campaigns
- Add multiple products to the leads
- Qualify leads to next stage based on information captured in lead details
- Convert leads into sales opportunities, accounts, and contacts with a single-click
- Lead conversion mapping for all the custom fields
- Create fully customizable lead reports
- Export leads to spreadsheet software, such as Microsoft® Excel®, OpenOffice®, and others for further analysis

Opportunity Management

- Track all sales opportunities end-to-end in a sales cycle
- Associate opportunities with accounts, contacts, activities, and other modules to have a better visibility on the opportunities
- Generate quotes, sales orders, and invoices from the potentials
- Create fully customizable opportunity reports

- Export opportunities to spreadsheet software, such as Microsoft® Excel®, OpenOffice® and others to analyze the sales pipeline and quickly identify the bottlenecks if any

Account Management

- Track all accounts and related contacts, opportunities, cases, and other details from a common repository
- Specify parent-child relationships between accounts and their subsidiaries or other divisions
- Import accounts from external sources, such as ACT, GoldMine, and other applications
- Generate quotes, sales orders, and invoices for the accounts
- Track purchase history of the customers and analyze opportunities for up selling and cross selling
- Create fully customizable account reports
- Export accounts to spreadsheet software, such as Microsoft® Excel®, OpenOffice®, and others to analyze the buying patterns of a customers and set up loyalty programs
- Attach customer-specific documents to accounts for a quick reference in future

Contact Management

- Track all contacts and related opportunities, cases, activities, and other details from a common repository
- Create the hierarchy of contacts within a company to have a better coordination while dealing with customers
- Import contacts from external sources, such as ACT, GoldMine, and other applications
- Export contacts to spreadsheet software, such as Microsoft® Excel®, OpenOffice®, and others for further analysis
- Synchronize contacts with Microsoft® Outlook®

Activity Management

- Add all important customer-related e-mails to CRM for quick reference in future
- Store all the details of customer meetings and calls in an intuitive calendar
- Manage daily tasks of the CRM users to have a streamlined sales process

Reports & Dashboards

- Pre-build reports for sales force automation
- Sales pipeline analysis by stage
- Monthly Sales pipeline analysis
- Sales opportunities by lead source
- Drill-down the dashboards by time and opportunity stage

Product Customization

- Add custom fields as per your organization requirements
- Customize tabs using drag & drop so that modules that are relevant to sales process can be shown
- Change the look and feel of the user interface using customizable themes

Customer Support & Service

CRM provides enterprise quality Customer Support & Service features, such as Ticket Management, Knowledge Management, Customer Self Service Portal, Reports, and Support Statistics specifically useful for your organization's customer support force. You can also use other customer support-related modules, such as Products, Activity Management, Calendar, Contact Management, and so on.

Key Modules

- Ticket Management
- Knowledge Base
- Customer Self Service Portal

Ticket Management

- Track all trouble tickets related to customers end-to-end as per organization's customer support process
- Associate trouble tickets with accounts, contacts, products, and other modules to have a better visibility on the trouble tickets
- Create fully customizable list views as per Support person's requirement
- Provide solutions to the trouble tickets submitted through Customer Portal
- Automatically update the status of tickets through E-mail
- Create fully customizable ticket reports
- Create customer support statistics to help the managers to plan for a better customer support process.

- Create custom fields as per your organization requirements

Knowledge Base

- Manage product-wise Knowledge Base in a centralized location for a better resolution of trouble tickets within least possible time
- Associate Articles with trouble tickets and products
- Provide public access to the Knowledge Base only after approval
- Maintain up-to-date Articles in CRM based on customer suggestions & comments

Customer Self Service Portal

- Fully customizable and you can deploy without hassles in your Web site
- Secured access to the Customer Self Service Portal
- Search Knowledge Base articles before submitting trouble tickets
- Constantly improve the quality of Knowledge Base by threaded discussions
- Notify trouble ticket update to the customers through E-mail
- Follow up the trouble tickets by threaded discussions
- Update customer profiles (limited functionality)

Marketing Automation

CRM provides Campaign Management, E-mail Marketing, Online Lead Forms, and Product Management specifically useful for your organization-wide marketing requirements. You can also use other marketing-related modules, such as Calendaring, Contact Management, File Attachments, and so on.

Key Modules

- Campaign Management
- E-mail Marketing
- Lead Management

Campaign Management

- Manage organization-wide marketing campaigns
- Track campaign effectiveness based on customer data
- Execute personalized mass mailing campaigns for the campaigns

E-mail Marketing

- Manage mailing lists based on existing data related to leads, accounts, and contacts
- Create HTML templates directly from the system
- Send mass E-mail campaigns from the selected mailing lists

Lead Management

- Capture leads directly from your Web site and transfer to CRM
- Customize online lead form as per your organization requirements
- Import leads from external sources, such as Web downloads, trade shows, seminars, direct mail, and other types of campaigns
- Qualify leads to next stage based on information captured in lead details

Inventory Management

CRM extends beyond traditional CRM to provide a complete sales cycle management by integrating Inventory Management functions, such as Products, Price Books, Vendors, Sales Quotes, Purchase Orders, Sales Orders, and Invoices with CRM modules, such as Leads, Accounts & Contacts, and Opportunities. Using CRM you can achieve the seamless integration between pre-sales and post-sales activities in a single application.

Key Modules

- Products Management
- Sales Quotes
- Order Management
- Invoices

Products Management

- Manage organization-wide products
- Associate products with other modules for a better 360 degrees view
- Import product details from other applications
- Create custom product fields as per your organization's requirements
- Attach product-specific documents, such as collateral, license agreements, and others
- Upload product images for easy identification

- Export product details to spreadsheet software, such as Microsoft® Excel®, OpenOffice®, and others for further analysis
- Create Price Books as per customer segment and associate products with Price Books
- Procure products from the selected vendors list

Sales Quotes

- Track outstanding quotes from the quotes list view
- Add line items to the quotes and update subtotal, taxes, adjustments, and grand total amounts
- Select different prices for the same product as per customer segment
- Create printer-friendly Sales Quotes and deliver to the prospect customers through inbuilt E-mail service
- Create Sales Order or Invoice with a single click from the Sales Quote
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses of the prospect
- Display quotes related to accounts under the related list
- Customize Sales Quote fields as per your organization's requirements

Order Management

- Streamline organization-wide procurement and fulfillment processes with integrated approach of CRM
- Track outstanding orders from the orders list view
- Procure products from the best available Vendors/Manufacturers/Resellers list in CRM
- Manage up-to-date stock position by seamless integration between order fulfillment and available stock in your warehouse
- Customize Purchase Order (PO) and Sales Order (SO) fields as per your organization requirements
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses of the prospect while creating orders
- Add line items to the Orders and update subtotal, taxes, adjustments, and grand total amounts automatically
- Create printer-friendly Order (PO/SO) and deliver to the Vendors/Customers through inbuilt E-mail service
- Once the Sales Order is accepted, create Invoice from Sales Order with a single click

- Periodically notify the stock position to the parties concerned in your organization so that stock is always available to fulfill the outstanding orders

Invoices

- Track outstanding invoices from the Invoices list view
- Create printer-friendly Invoices and deliver to the customers through inbuilt E-mail service
- Customize Invoice fields as per your organization requirements
- Add line items to the Invoice and update subtotal, taxes, adjustments, and grand total amounts automatically
- Customize Invoice fields as per your organization requirements
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses of the customer while creating invoices
- Associate invoices with the General Ledger account for hassle-free Book Keeping