Introduction

Everyday managers interact with a huge number of clients. Usually the information about them stored
in different files, sometimes important things can be written even in old notebooks and stickers.
whom to call back and when? what to suggest? what to talk about?
besides some managers consider databases their private property. So, if the specialist can sick, goes on
vacation or retires his database actually become unavailable for the rest of the company.
You can easily get confused with old fashioned client bases and lose the customer as result. We can't
depend on human factor.
There is a solution and it's called "Customer Relationship Management"

CRM

CRM or Customer Relationship Management is a strategy for managing an organization's
relationships and interactions with customers and potential customers. A CRM system
helps companies stay connected to customers, streamline processes, and improve profitability.
When people talk about CRM, they are usually referring to a
CRM system, a tool that is used for contact management, sales management, productivity, and more. The goal of a CRM system is simple: Improve business relationships.

Why choose CRM?

Increase productivity.

Exceptional customer service.

Put all activities history in one place.

Close more deals in less time.

Shift your team into higher gear.

Strengthen brand image and reputation.

Break sales records without breaking a sweat.

Create more successful targeted marketing campaigns.

Why is CRM Important?

CRM enables a business to deepen its relationships with customers, service users, colleagues, partners and suppliers.

Forging good relationships and keeping track of prospects and customers is crucial for customer acquisition and retention, which is at the heart of a CRM's function.

You can see everything in one place — a simple, customizable dashboard that can tell you a customer's previous history with you, the status of their orders, any outstanding customer service issues, and more.

A CRM System provides

- Customers Profiles
- Quotations
- Calls
- Sales activity history
- Notifications
- Chats
- Reporting
- Permissions
- Referrals program
- Products / Services

- Emails
- Notes
- Attachments
- Contacts management
- Meetings
- Sales team profiles
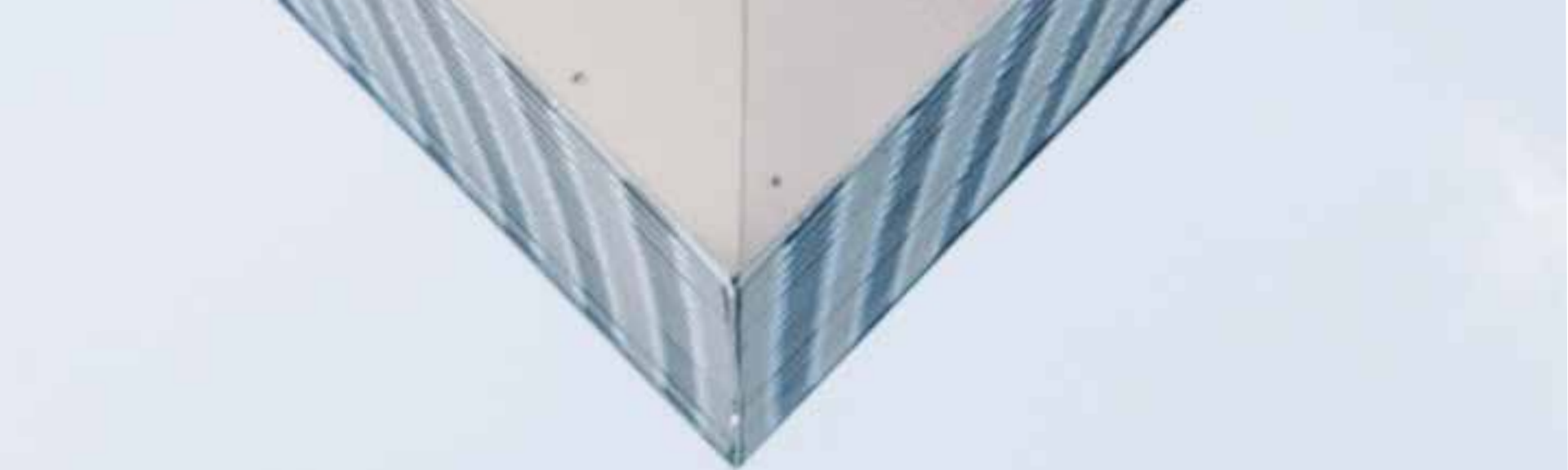- Approvals workflow
- Dashboard
- Reminders
- Customers summaries

How do different business functions benefit from using CRM?

Customer service teams can effectively track conversations across channels

Sales teams can use CRM to understand their sales pipeline better.

Marketing teams can use CRM to make forecasting simpler and more accurate.

Projects

Invoices

Supports

Stripe Subscriptions

Estimates

Proposals

Expenses

Payments

Leads Management

Reports

Web to Lead Forms

Calendar

Timesheets Reports

Goals Tracking

Recurring Tasks

Custom Fields

Tickets

Tasks

Knowledge Base

Contracts

Surveys

Customers Area

E-Signature

Personal Todo List

Reports

Reports

Sales

Expenses Report

Reports by customer

Custom date picker

Leads Conversions

Knowledge base articles
(Track if your article is useful to clients, improve text based on votes).

Server Side Datatables

Responsive

Google ReCaptcha

Action Hooks

Activity Log

Flexibility

Inventory Management for Optimal CRM

Benefits of Inventory Management Module

01 **Optimized Processes**

02 **Inventory Visibility**

03 **Reduced Admin Work**

04 Improved Supplier and Customer Relationships

05 Reduced Labor Costs

06 Enhanced Security
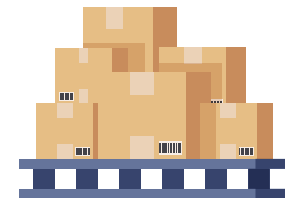
Inventory Management
Process

01 **Receive Goods**

02 **Inbound Receipts & Put Away**

03 **Track & Allocate Stock**

04 **Picking**

05 **Packing**

06 **Work In Progress (WIP)**

07 **Shipping**

08 **Returns**

09 **Reporting & Analytics**

Module Features

- **Product/Service Management**
- **Bulk Import Products**
- **Bulk Import Opening Stock**
- **Print Barcode Labels**
- **Barcode Scanning**
- **Barcode Scanning**
- **Inventory Receiving Voucher Management**
- **Delivery Note Management**
- **Packing List Management**
- **Shipping Activity Logs**
- **Internal Delivery Note Management**
- **Loss & Adjustment Management**
- **Inventory Transactions Management**
- **Warehouse Management**
- **Reports**
- **Settings**
- **Integration**

Purchase Management for Optimal CRM

01 **Reduces the procurement process time**

02 **Provides good data quality**

03 **Provides good hold of the procure-to-pay process arammarak**

04 Controls budget in
real-time

05 Allows you to access
historic data easily

06 Makes internal approval
process easy

07 Enhances data security

08 Need not depend on people

Purchase Procedure Steps

1 Purchase Requisition

2 Purchase Order

3 Review and Approval

4 Review of receiving goods/services

5 Requests for Quotation

6 Matching of Documents

7 Invoice Approval and Payment

8 Maintenance of Vendor Relations

Module Features

- **Product/Service Management**
- **Vendor/Supplier**
- **Purchase Request Management**
- **Supplier Quotation Management**
- **Compare Quotes from Suppliers**
- **Purchase Order Management**
- **Supplier Contract Management**
- **Debit Notes Management**
- **Supplier Invoices Management**
- **Payment Management**
- **Reports**
- **Settings**
- **Vendor/Supplier Portal**
- **Integration**

Assets Management module

Assets Management Module contains the following functionality:

- Create assets (editing/removing it as well)
- Create customer-based Assets, corporate-only assets and mixed ones
- Revoke an asset
- Add additional assets in existing asset
- Assign an asset on a specific staff user
- Transfer assets between users
- Report an asset loss
- Report an asset as a broken one
- Liquidation record of an asset
- Warranty record of an asset
- Allocated Assets list
- Revoked Assets list
- Deprecated Assets list
- Ability to separate assets based on unique units, asset groups and asset locations (listing as well)
- Ability to add images to your assets (publicly accessible, through changeable constant for uploads dir)
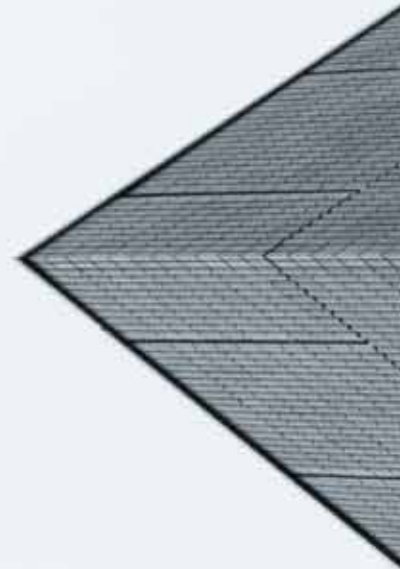
HR Payroll module

Simple, affordable payroll for small business!

01 **Happy Employees**

02 **Less Time Wasted**

03 Tax Compliance

04 Compensation

05 Government Reporting

Payroll Process

01 Defining Policy

02 Gathering input Data

03 Input Validation

04 Payroll Calculation

05 Statutory Compliance

06 Payroll Accounting

07 Payout

08 Reporting

Module Features

- Employee Profile Management
- Attendance Information Management
- Commission Information Management
- Salary Deductions
- KPI Bonus
- Insurance Management
- Income Taxes Management
- Payslip Template Management
- Payslips Management
- Settings
- Payslip Template   Management
- Payslips Management
- Settings
- Report
- Integration

HR Records module

Benefits of HR Records Management Module

01 Employee Engagement

02 Onboarding

03 Performance Management

04 Reimagine Learning and Development

05 Centralized Document Management

06 Effortless Query Management

07 HR Analytics for Informed Decision-Making

Key Features for Optimized HR Records Management

01 Organizational Chart

02 Job Descriptions

03 Personal Records

04 HR Contracts

05 Training

06 Dependants

07 Onboarding Process

08 HR Policies

09 Layoff Checklist

Module Features

- **Dashboard:**
- **Job Description Groups Management**
- **Job Descriptions Management**
- **Company Organizational Chart**
- **Onboarding Management**
- **HR Records Management**
- **Training Management**
- **Contracts Management**
- **Dependants Management**
- **Layoff Management**
- **Q&A and Company Policy Management**
- **HR Reports**
- **Setting**
- **My profile**
- **Integration**

Timesheets and Leave Management

- Timesheets & Leave module
- Track your time easily and efficiently
- Efficient staff holiday planner
- Easy tracking of all absences
- Define approval workflows
- Easy shift planner
- Effectively plan and manage shifts

The Parts of the Module

- Set up annual leave
- Manage work shift lists
- Manage work shifts
- Attendance Management. There are five ways to Take attendance:
- CHECK IN/OUT MANUALLY
- PROJECT/TASK TIMESHEETS
- GEOGRAPHICAL LOCATION
- DATA FILE
- WORK ROUTES
- Report and Statistics

Optimal CRM
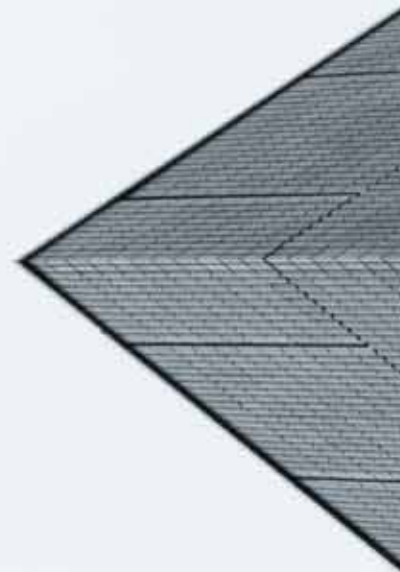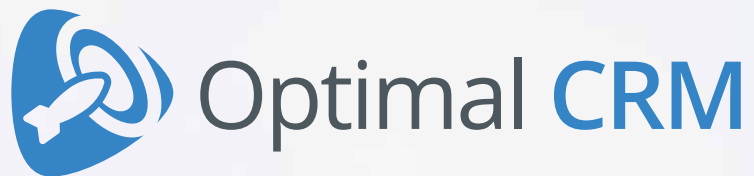
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THANK YOU!

Create Good Looking Proposals

Theme Styling without coding

Project Milestones

Events

Send Estimates to Customers

Easily re-organize admin menu

Easily Copy tasks

Staff

Change Color Styles

Email Templates

Adjust Menu Items

Staff Roles and Permissions

Recurring Expenses

Company News Feed

Recurring Invoices

Staff Tasks

Track Timers by Multiple Members

Media Library

Departments

Auto Backup Database

Custom Fields

Sensitive Data is Encrypted

Staff Reminders

Lead Forms