### Dashboard:

Total Sales analytics with Sales target

Sales analysis with amount of Leads and Opportunity

Compare current sales perfomance with previous time periods

Get to know the Funnel size of all deals with its stages

Stay informed to Zone wise data from All branches and Zones

Keep realtime tracking on Pyment collections

### Employee:

Manage Employee Access, Roles and Responsibilites

Mnage Hierarchy of employees and Task assignments

Track employee Performance in one go

Admin can Add, Suspend, Update Employee records

Tracking of Salesman by Higher in Hierarchy

### Leads:

Leads can be created and Updated in seamless effort

A List of endless no. of Leads generated from Campaign

Bulk upload of Leads in one click

Download/Export any kind of data from the list

Keep track of Follow-ups individually

Distinguish Qualified leads easily

Keep Documents for future reference

Easy hack by Setting Reminder for leads

### Campaign:

Manage campaign and Its audience

Filter out Reciepter from Leads, Customer, Opportunity

Manage Multiple numbers of Campaign from one place

Social Media campaign

Whatsapp Campaign

Emailer Campaign

### Contact:

Contact Book for all Contact persons

Keep quick and Short way to save contact

Mapping contact with Leads, Customer, Projects, Deals

### Calender:

Stay up to date with interactive calender

Create Meetings, Events, Activities for future with any Lead, Customer, Contact

Set owner of each Events or Activities

Get Integrated with Teams, Google Meet for workspace management

### Customer:

Create customer as prospect directly from a Lead

Contact person, Branch offices Projects save all details

Perform Edit/Delete action on customer anytime

Direct access to Deals, Order, Invoices from the Customer details

Bulk uploading list of customers to system on single click

Download/Export any data from the Customer

### Opportunity:

Create Opportunity and map with lead/customer

Perform Edit action on opportunity

Maintain stages as per progress in Deal process

Add stages as per own requirement

Categorization of deals Hot, warm, & ambient as per the stages completed

Gather infos like Probability and Potential amount and Project the future revenue

Import/Export of any data from the system or to the system

### Quotation:

Create quotation along with selective from inventory

Adjust the quotation amount by applying Discount %

Choose templates of Quotation format

Maintains approval status of the Quoation as Approved/Rejected by manager or admin

Edit action on quotation

Get PDF format of the quotation share with anyone

### Order:

Create order directly from the selected Quotaion

Maintain Status of the order as Open, Close, Cancelled

Once order Closed, order cannot be edited

Order can be updated by Addendum by adding more Items in same order

Exporting of any Order data in single click

### Invoice:

Once the invoice get generated, Order status changes to closed

Invoice can be created directly from the selected order

Invoice PDF format can be shared out or print out

### Inventory:

Create categories, Sub-categories and enroll items with MRP with GST/Tax %

Bulk uploading of Items with categorization in one go

Download/Export the List of items with categoty

Edit the inventory only with Admin authorization

Dsicount amount maintained for all items by Salesperson to custom the item price

### Delivery:

Maintaining realtime info of Sold items

Manage logistic mode by projecting the delivery date

Status is maintained as over to locate the items as delivered to customer

### Setting:

In setting modules can be customized as per hierarchy Salesman/Manager

Choose modules from the whole Bridge CRM as per own requirement

Self configure sections like;

1. Industry type
2. Opportunity type
3. Payment Terms
4. State
5. Source

### Tender:

Tender can be auctioned and Keep track through Bridge CRM

Enlist and Create a tender with Fees, Work description details

Once you win a tender you can create order directly.

Mapping Tender completion from Opportunity.

Mapping competitors list with Tender.

### Target Assignment:

Set sales target for Manager/Salesman

Target can be set in quarters of any Fiscal year

Targets and Actual sales can be analized for further business accomplishment

### Note: **ERP integration will be seamless along with Auto-punching of CRM data into ERP system, Import file format in Bridge -EXCEL and Export File formats are -EXCEL and PDF**