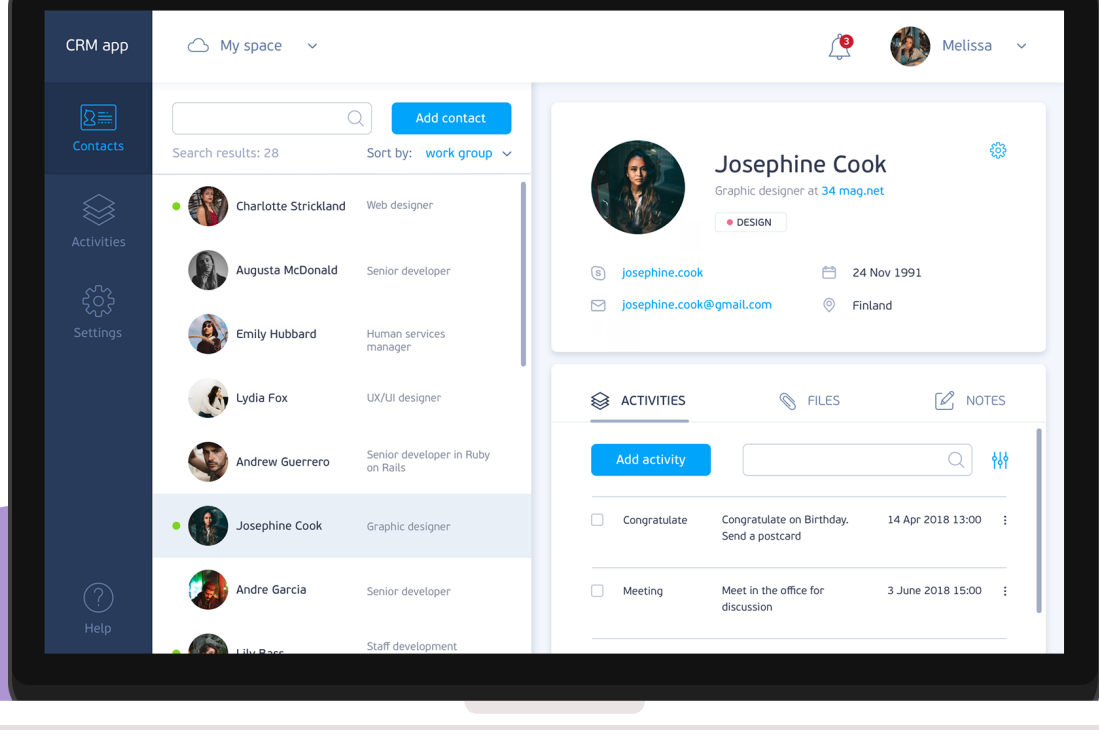


Handy Custom CRM Software

A full-featured online CRM system for successful customer management. The online CRM system based on the Webix allows organizing all data (contacts, phone calls, correspondence, purchases) related to your customers in one place.

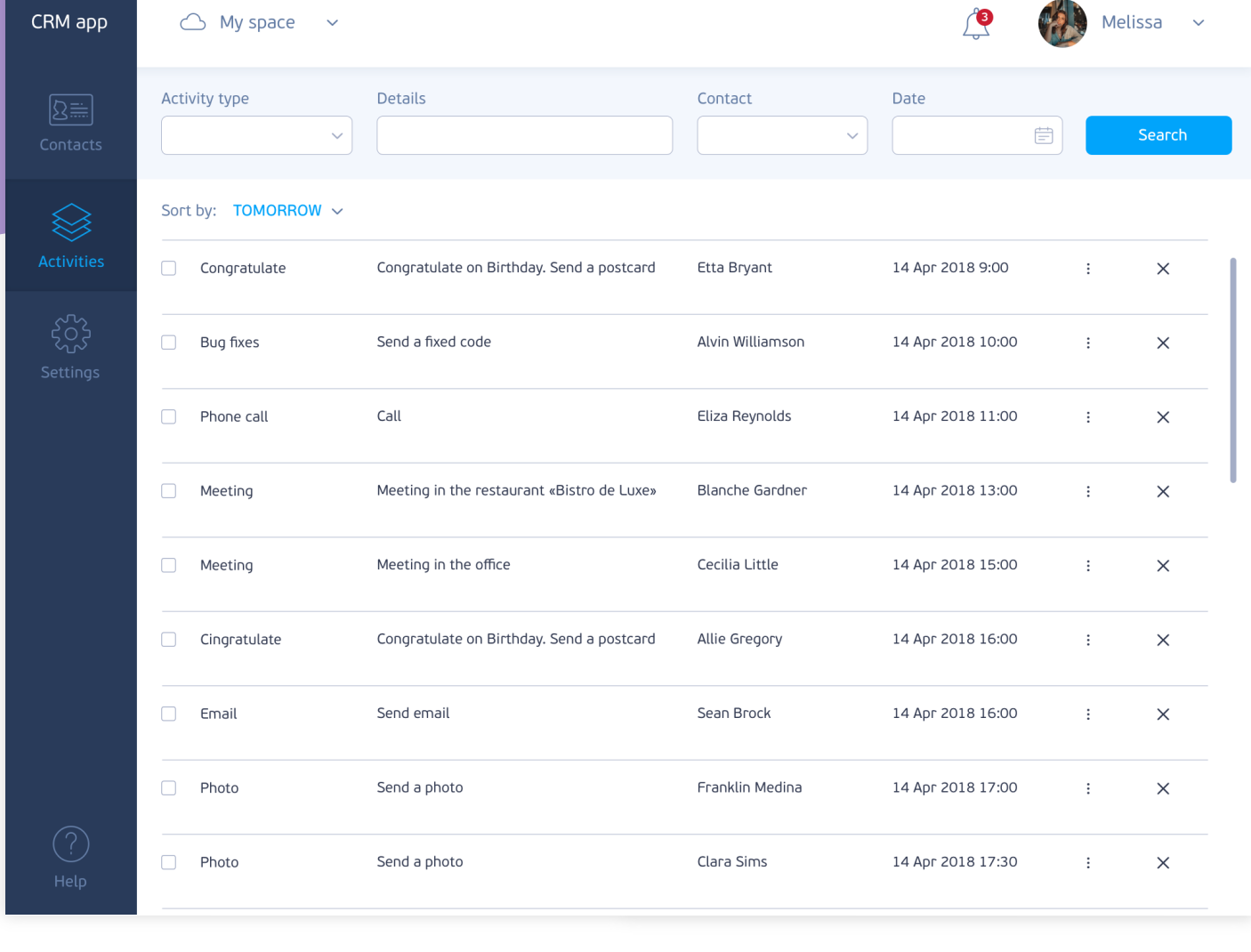


2017

Business Challenge

Dealing with customers is not an easy task to do due to the enormous amount of information that you should keep in mind. Each new client generates a vast number of records that you must track continuously. Contact information, lists of purchases, correspondence, and other data should be easily accessed online to guarantee the better outcome of your work.

Our ERP software development team was asked to build an online customer relationship management (CRM) system that would allow to access customer-related info and improve interaction between the company and its clients. This online CRM software should allow users to track and handle activities and access all info related to your core customers in one place. Also, all users of this online CRM system should have the possibility to create and monitor activity lists to meet deadlines. Another requirement was to provide team members with a reliable collaboration mechanism.



Solution

XB Software's developers have built a comprehensive online CRM system that provides **easy access to all customer-related data**. Users can use built-in templates to **create activity lists** that help to monitor deadlines efficiently. All activities contain detailed info such as contacts of related customers, for example. To improve collaboration between the team members, developers have added mechanisms of **sharing workspaces** between different employees to this online CRM system. The app is easily customizable which allows adapting to the features of a particular company. For example, there's a possibility to **customize activity types and statuses**.

Drag-and-drop support allows creating and re-arranging activities with ease. Also, you can close a particular task with a single click. **Cross-browser support** along with **touch-friendly** and responsive design allows using this CRM system on any devices. Excel **import and export** feature allows sharing the info between multiple employees and creating a presentation.

To develop a user-friendly, neat, and responsive user interface, our developers used the Webix JavaScript library. Moreover, the custom CRM system was developed as a SaaS solution that can be adapted and customized according to your business needs.

Applied Technologies

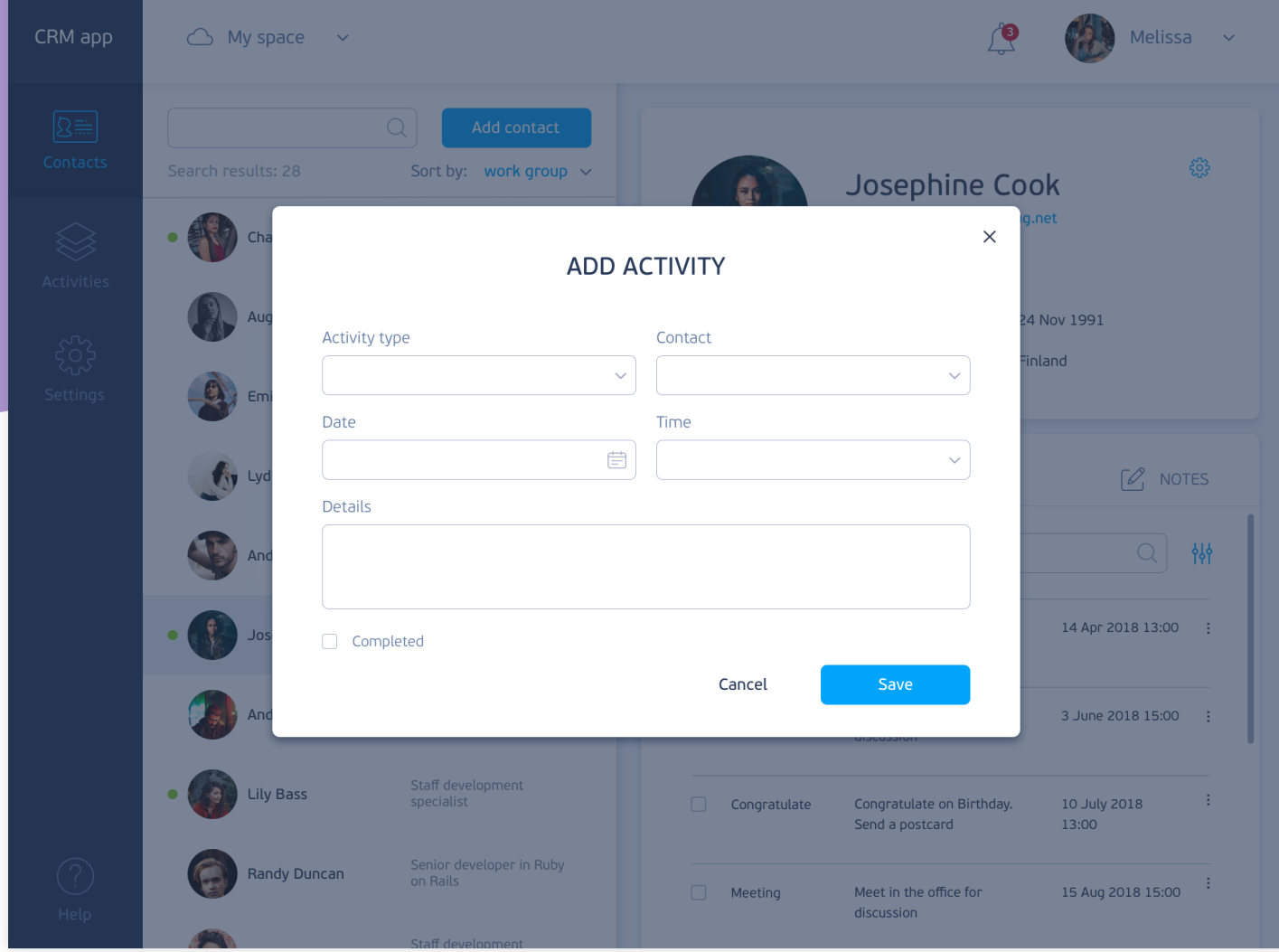


Duration

7+ months

Estimated man-hours

1500+ hours



Our Role in the Client's Success

The broad experience in custom web application development allowed XB Software's developers to create a comprehensive online CRM system. It allows users to increase customer satisfaction and work performance significantly. The online CRM system provides easy access to all customer-related data and allows efficiently tracking all current activities.

The created CRM software allows managers to:

- improve interaction with customers and increase their loyalty
- increase team members collaboration and enhance their effectiveness
- create and handle activity lists in-a-click to keep up with deadlines and improve the task tracking process

Customer

A Belarusian company that develops full-featured ERP solutions and comprehensive web-based products for enterprises.

Thanks for watching!

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