Title:

Exploring SaaS Solutions - FlowLu CRM

Objective:

Evaluate the feasibility of Flowlu as a comprehensive free SaaS CRM solution for small businesses.

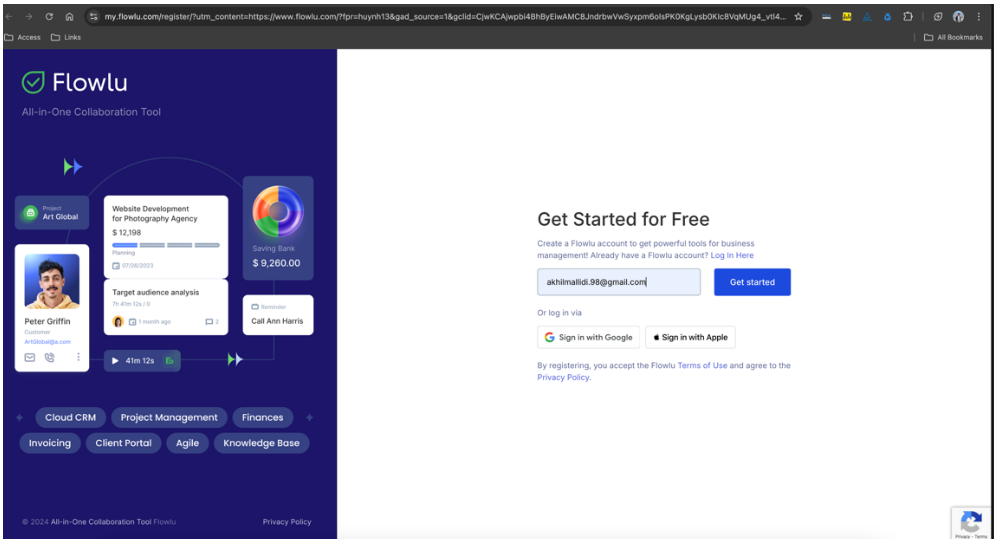
Theory:

The concept of a completely free, all-inclusive SaaS CRM like Flowlu challenges traditional notions of CRM software pricing by offering 9 different sets of tools that manage every step of the sales process. This approach promises to deliver cost savings and scalability benefits to small businesses, but also raises integration challenges with other business systems, requiring additional technical expertise. To determine whether Flowlu can indeed provide an effective, free CRM solution for small businesses, a detailed evaluation of its capabilities, user experience, and potential pitfalls is necessary.

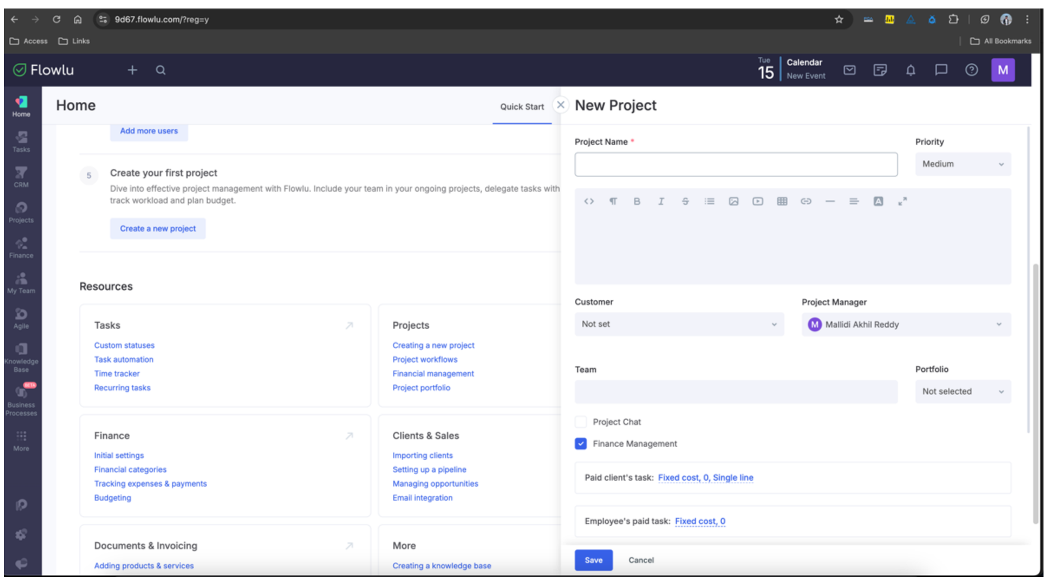
Procedure:

1. Go to the Flowlu Website and signup
    a. https://www.flowlu.com/uses/best-free-saas-crm/

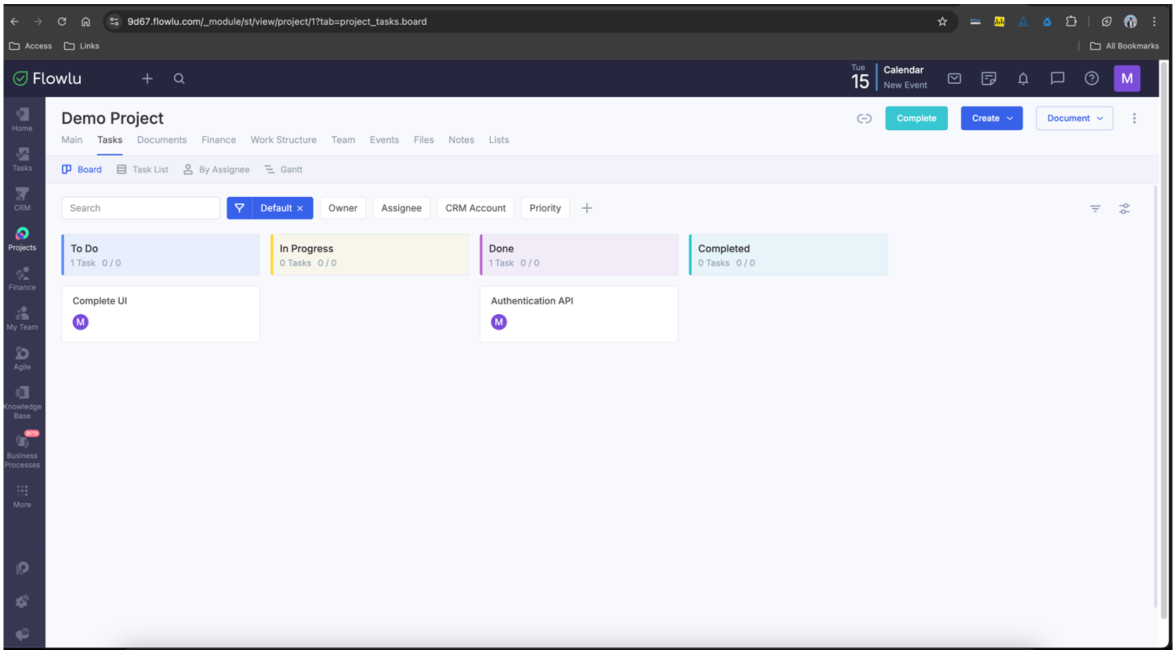
2. Signup Your account and create a sample test project as instructed in the video and then come to this home page



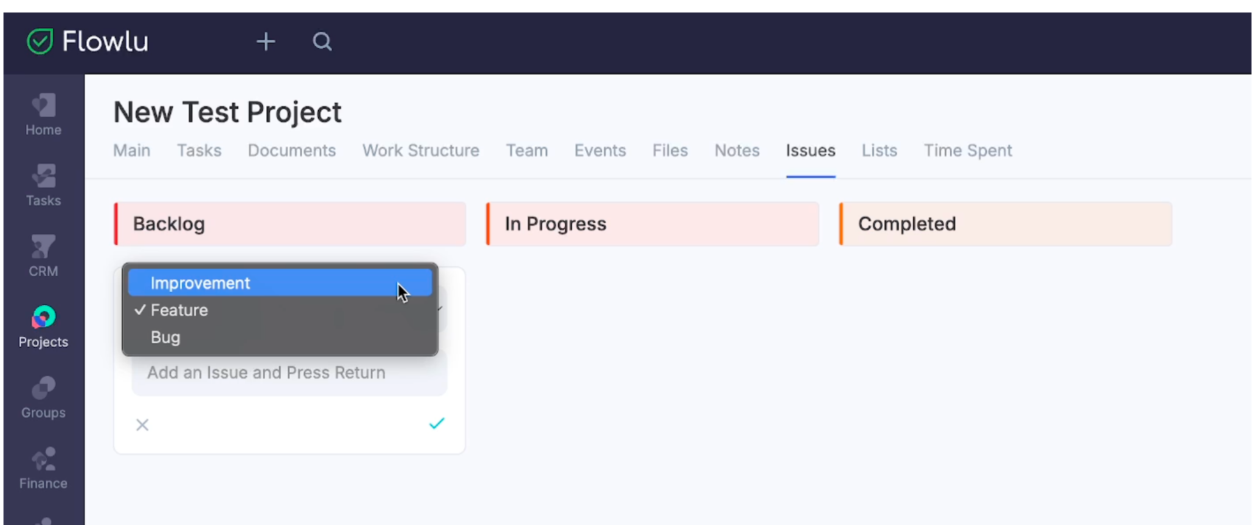
3. Creating an sample project with some additional info



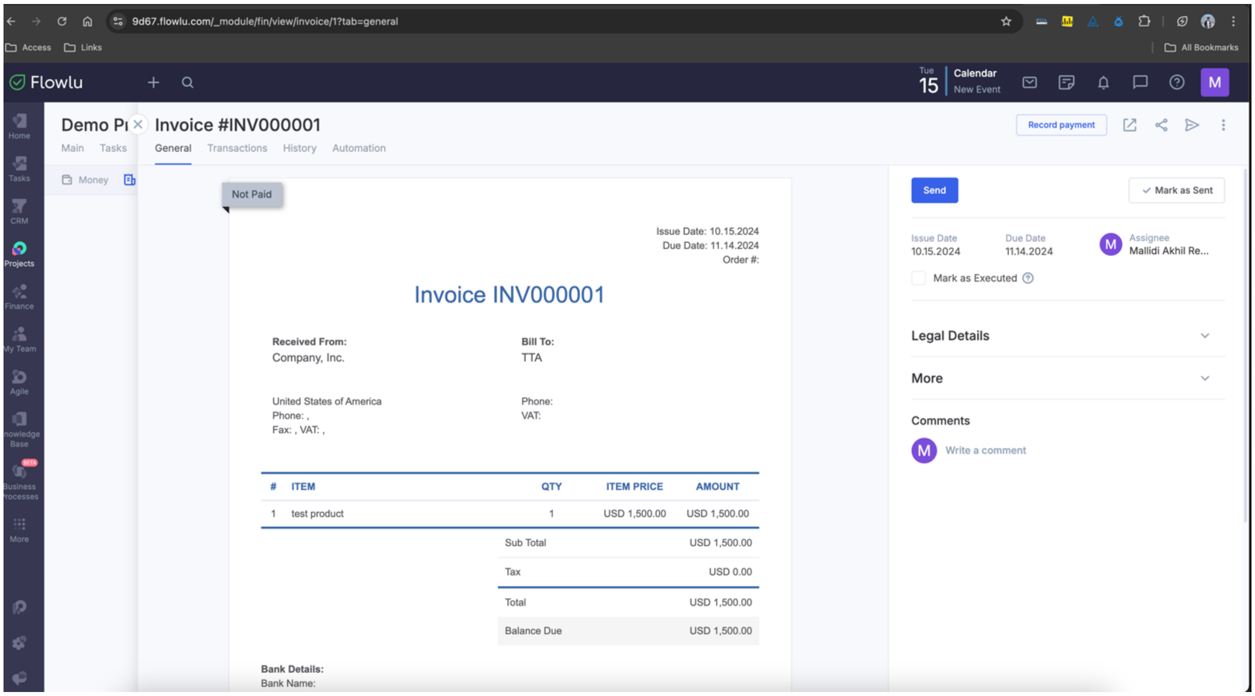
4. Go to tasks and create sample tasks



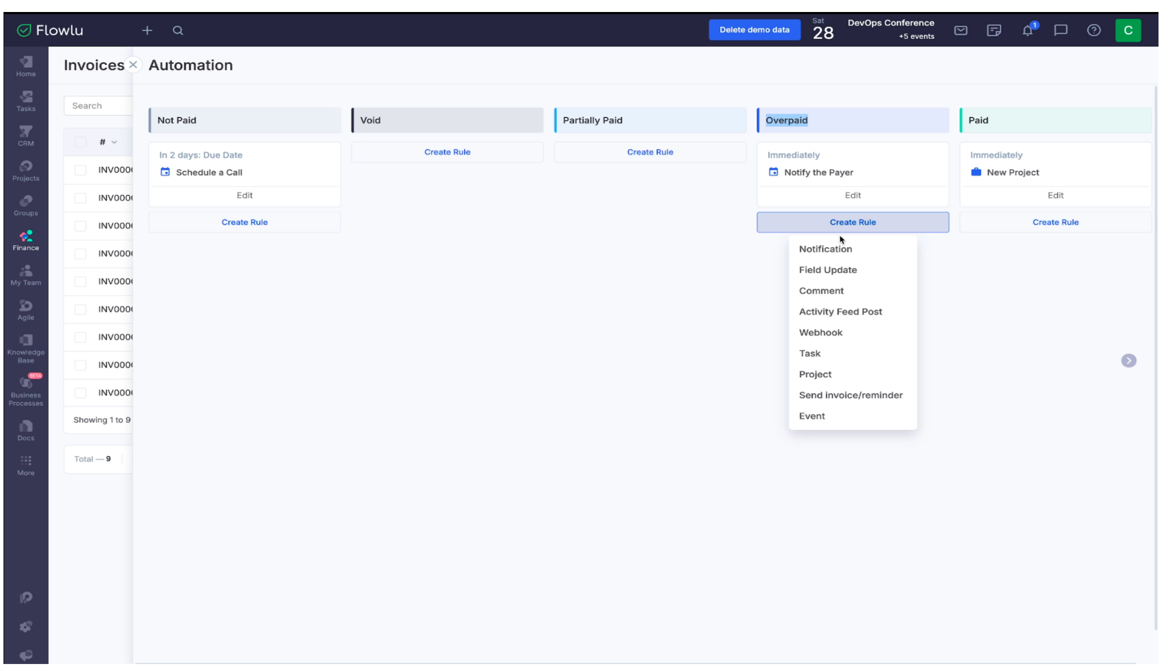
5. Explore Other tabs like documents, teams, events, roles, files, notes, issues, lists.



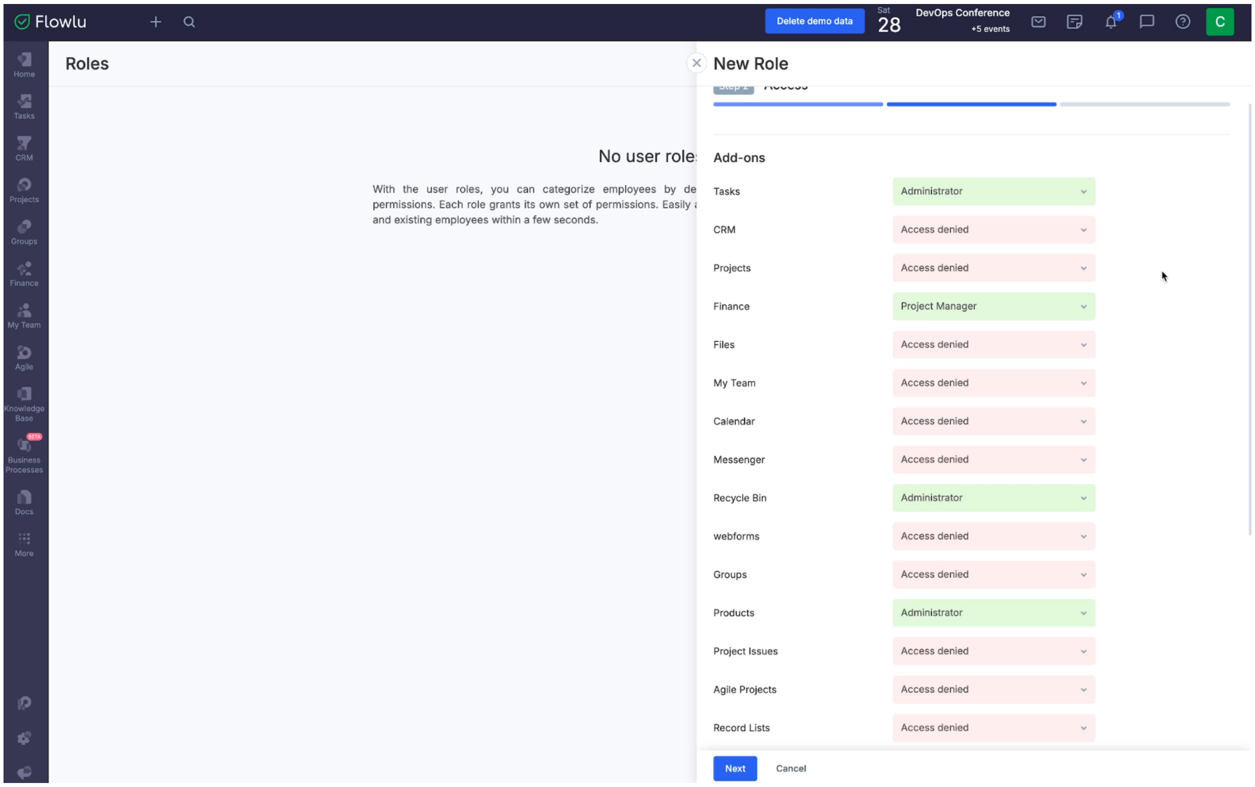
6. Go to finances tab and then try Managing Invoices / creating invoices



7. Explore automations using webhooks and other events which allow it.



8. Create and manage a role



Expected Output:

Learned about what a SaaS solution look like and how you can make use of powerful CRM’s to manage a lot of things in the company.