

Title:

Exploring SaaS Solutions - FlowLu CRM

Objective:

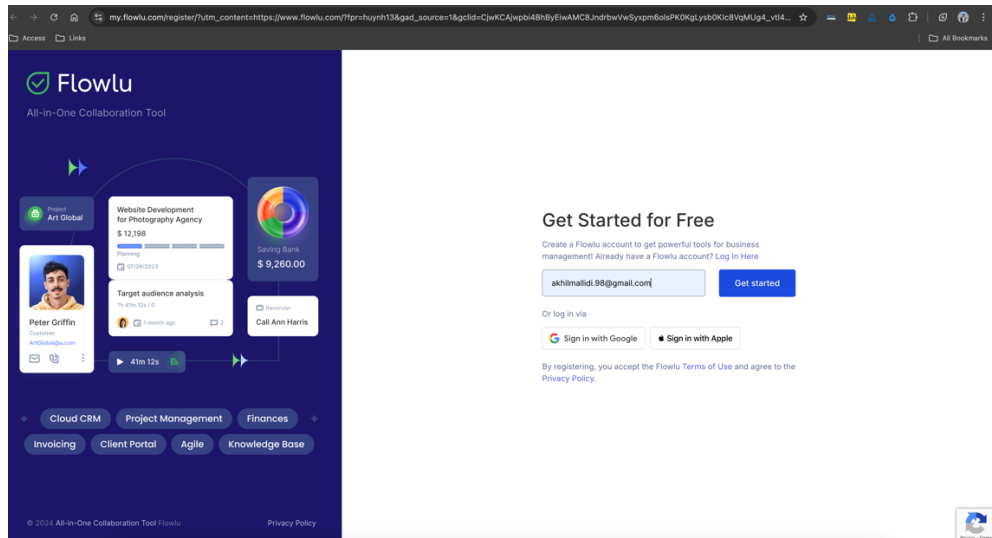
Evaluate the feasibility of Flowlu as a comprehensive free SaaS CRM solution for small businesses.

Theory:

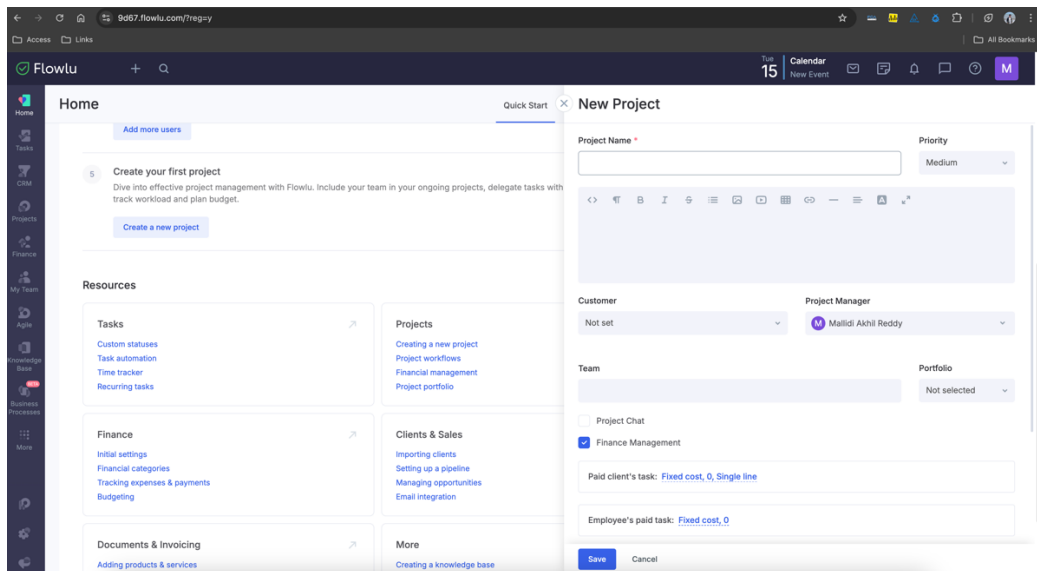
The concept of a completely free, all-inclusive SaaS CRM like Flowlu challenges traditional notions of CRM software pricing by offering 9 different sets of tools that manage every step of the sales process. This approach promises to deliver cost savings and scalability benefits to small businesses, but 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:

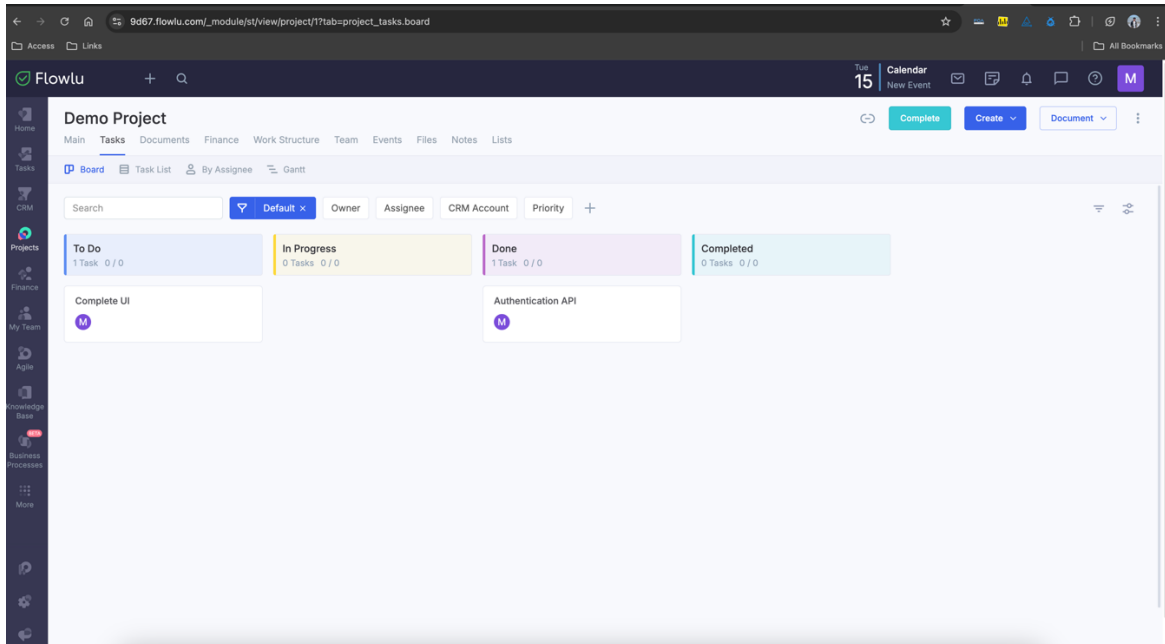
1. Go to the Flowlu Website and signup
 - a. <https://www.flowlu.com/uses/best-free-saas-crm/>
2. Signup Your account and create a sample test project as instructed in the video and then come to this home page



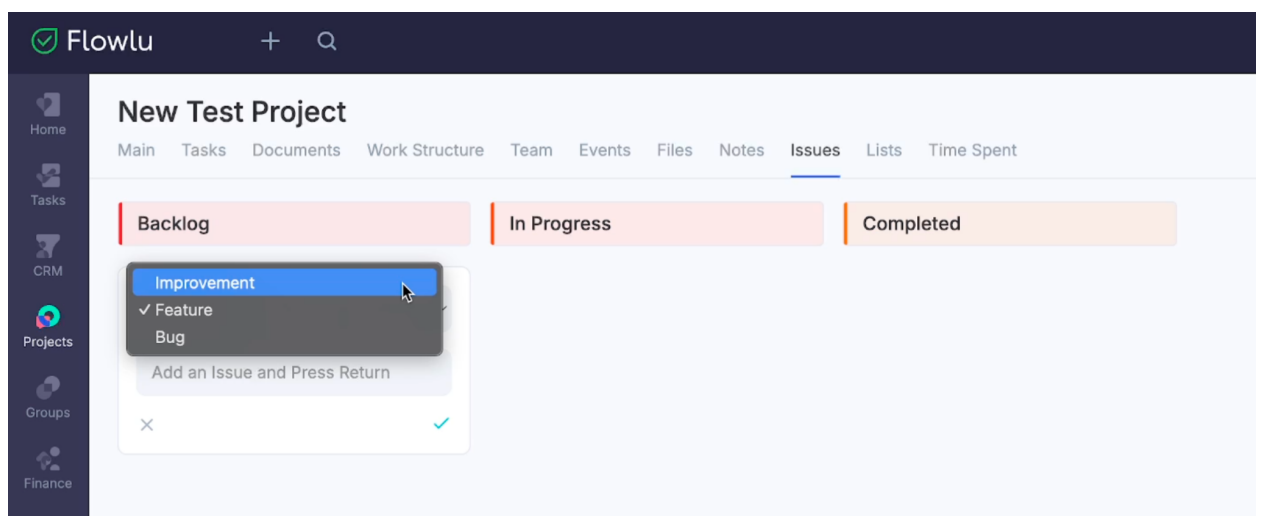
3. Creating an sample project with some additional info



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

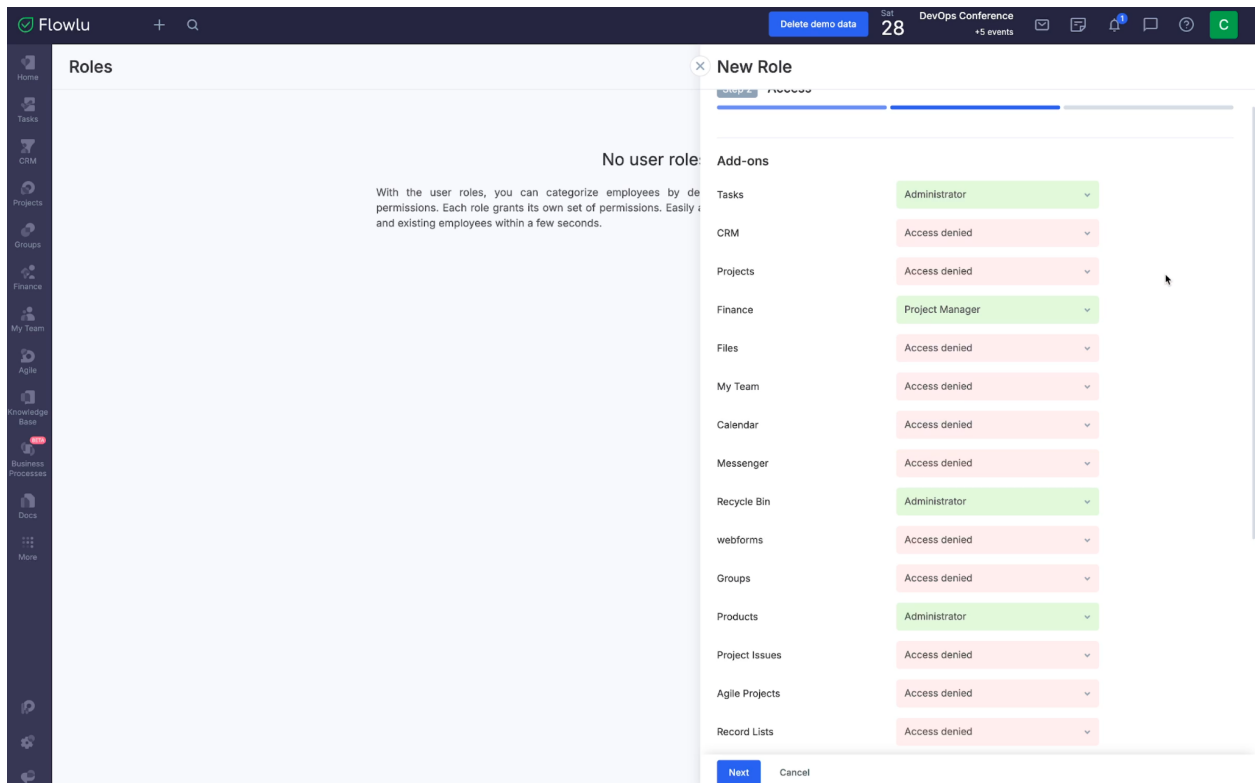
The screenshot displays the Flowlu application interface. The top navigation bar includes a sidebar with icons for Home, Tasks, CRM, Projects, Finance, My Team, Agile, Knowledge Base, Business Processes, and More. The main content area is titled 'Invoice #INV000001' and is divided into several sections. On the left, there's a 'Not Paid' status indicator. The central part of the invoice shows the 'Received From' (Company, Inc.) and 'Bill To' (TTA) information, along with their respective addresses and contact details. Below this, a table lists the items: 'test product' with a quantity of 1, priced at USD 1,500.00. The table also shows the 'Sub Total', 'Tax', 'Total', and 'Balance Due', all at USD 1,500.00. On the right side, there's a 'Send' button, a 'Mark as Executed' checkbox, and a 'Comments' section with a 'Write a comment' button. The bottom of the invoice shows 'Bank Details'.

#	ITEM	QTY	ITEM PRICE	AMOUNT
1	test product	1	USD 1,500.00	USD 1,500.00
Sub Total				USD 1,500.00
Tax				USD 0.00
Total				USD 1,500.00
Balance Due				USD 1,500.00

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

The screenshot shows the 'Automation' section for 'Invoices' in the Flowlu application. The interface is divided into five tabs: 'Not Paid', 'Void', 'Partially Paid', 'Overpaid', and 'Paid'. Each tab has a 'Create Rule' button. The 'Not Paid' tab is currently selected, showing a rule configuration for 'In 2 days: Due Date' with a 'Schedule a Call' action. The 'Overpaid' tab is also visible, showing a rule configuration for 'Immediately' with a 'Notify the Payer' action. A dropdown menu is open, listing various events and actions: Notification, Field Update, Comment, Activity Feed Post, Webhook, Task, Project, Send Invoice/reminder, and Event. The bottom of the screen shows a list of invoices with a search bar and a 'Total' of 9.

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.