CRM Requirement

The CRM system should have two main sections CRM and Support and have the minimum features as described below.

Customer Profile

The customer profile should contain at least the following information: Company name, address, website and telephone number, sector, hired employee count, contact employee at company. *I should able to add company employees to the system like RMP*.

There should the also be a section that stores the customers product information, such as: product purchased (RMP or HRM), support package purchased, date both were purchase, expiry date of support package and the ability for me to generate/upload any client invoices, contracts agreements or any other document.

There should be a customer search facility made up from the data stored in their profile that would allow me to choose the criteria and search. Eg: customers with 100 employees, who purchased RMP etc… and also the ability to combine search criteria.

I should be able to dynamically add things like support packages, and products. A list of fields we be provided.

Support Features

The support section is made up of two sections.

1. Knowledgebase (copy kayako).

It puts text, videos and/or PDF’s etc in the answers to the questions.

1. Support ticket system (You know what’s needed here).
2. Reports and analytical information.
3. A news section like in RMP marketing, but this information is specifically for our customers and comes under the support section.

The CRM should be bilingual, English and Arabic interface and content.

References:

Company Employee profile: http://ndesaintheme.com/apricot/profile.html

Invoice page: <http://ndesaintheme.com/apricot/invoice.html>

Knowledge base, instant ticket and support center: <http://www.kayako.com/product/tour/>

A 24/7 support destination your customers will love