

Core-Brackets

CRM

Proposal

CRM

System Overview

Typically, Marketing and Sales managers find it easy to see the benefits of adopting a Customer Relationship Management (CRM) system. They appreciate that in CRM their sales data is going to be stored centrally and presented in an easy-to-follow format, allowing them to monitor processes, staff performance and, as a result, optimize selling.



CRM System Features

Activity Type

Register all Activity types of Activities.

Opportunity Stage

Add all possible stages for opportunity.

Opportunity Lost Reason

Add all possible reasons for opportunity lost.

Sales Channel

Allow to add new channel for sales items linked with employee or more.

Sales Commission

Allow to add commission for sales.

Sales Target

Allow to add target for sales.

Contact & Customer

Register all data of every contact & customer.

Lead

Allow to add new lead and manage it with contact.

Opportunity

Allow to add new opportunity and manage it till finish.

Activity

Allow to add new activity and manage it with opportunity (estimate & actual plan).

Quotation

Allow to add new quotation and manage it with customer.

Invoice

Allow to add new invoice and manage it (allow to check if it recurrent as renew automatic).

Notification real time

Notify user once action created.

Company

Register all company data.

Branch

Allow to add new branch and manage it.

User

Allow to add new user and manage it.

Role

Allow to add new role and manage it.

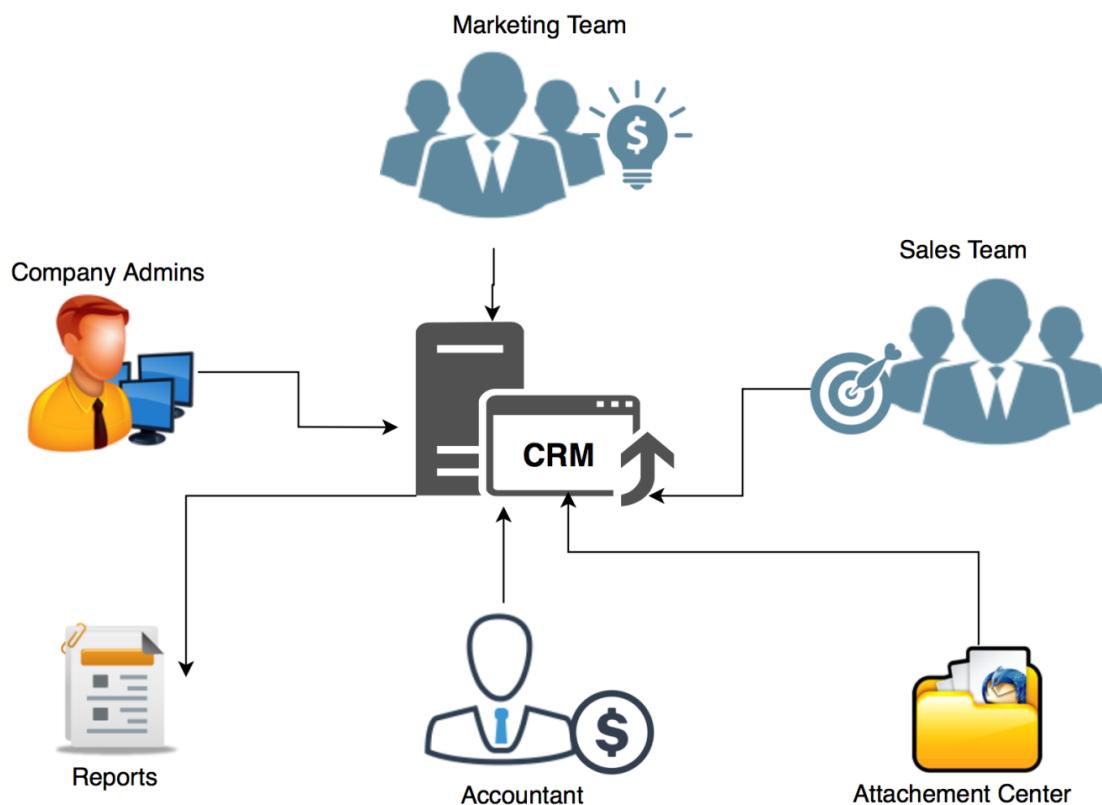
Role Permissions

Allow to add permission for role and manage it.

Employee

Allow to add new employee and manage it.

Implementation Structure



Marketing Team

Marketing Team system activities

1- Publish new projects on Online Portal with ability to share its link to collect customers data interests with this project

Coronnado Marina Ain Sokhna

[BACK](#)

start from 400,000

BEDS 4
BATHS 4 full, 1 half
HOME SIZE 4,144 sq ft
LOT SIZE 18,590 sq ft

[SCHEDULE A](#)

Ah Romance! As you enter into this gated and walled St Armands bay front estate it feels as if the weight of the world has been lifted

Contact Us for More info

Ask questions or schedule a showing!

First
Name *
Last
Name *
Email *

How May I
Assist
You? *

[Request More Information](#)

Customers' data will be Saved directory to the CRM Database under the Marketing Person who published this project.

2- Client Data Management – Business Development

 CREATE CONTACT
Add New Contact

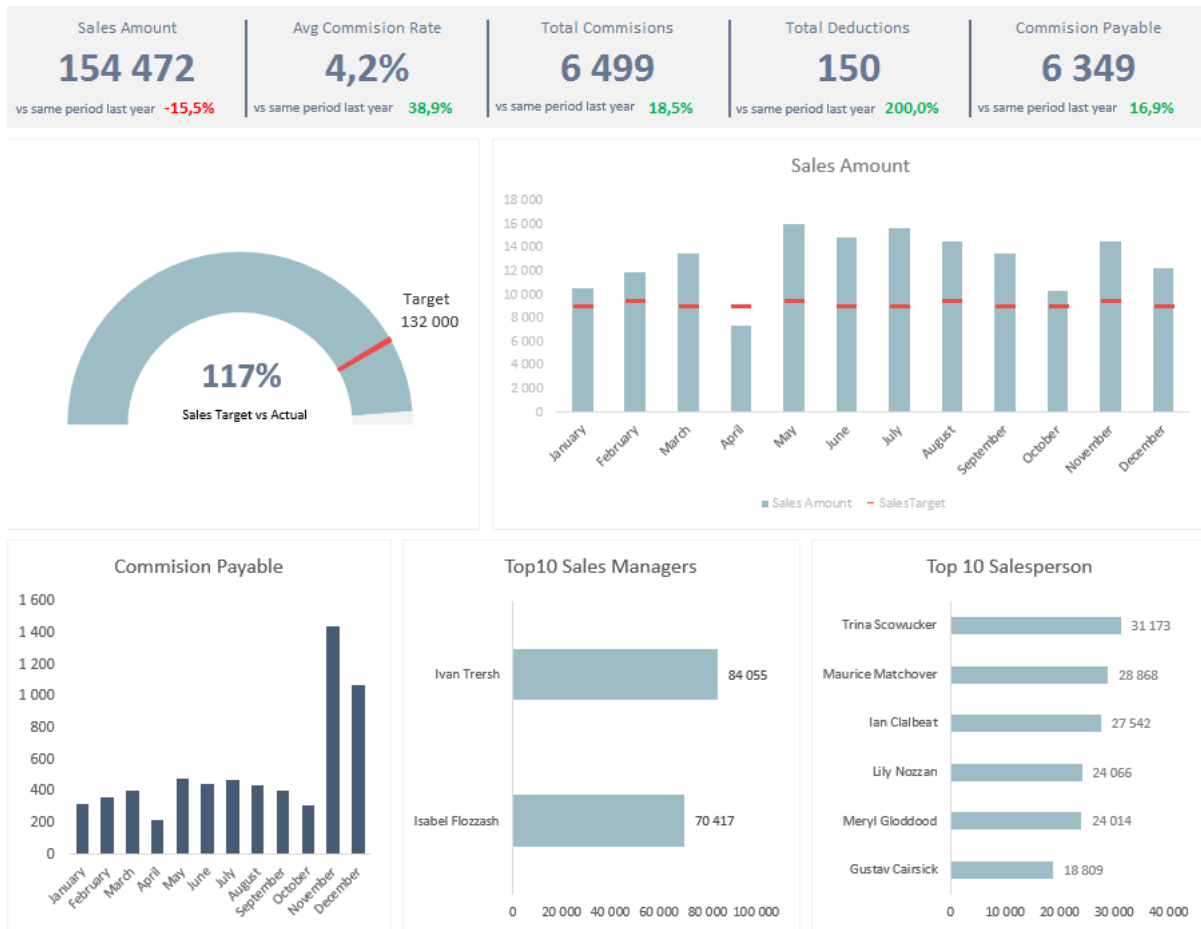
NAME AND OCCUPATION
Name
Organization
Title

CONTACT DETAILS
Email 
Phone 
Home Phone 
Mobile Phone 
Other Phone 
Assistant Phone 
Assistant Name
Fax 
LinkedIn
Facebook

3- Assign Sales Team for new project to start sales



4- Reports and statistical information / Dashboard



Reports and Dashboard will be customized based on your requirements.

Sales Team

Sales Team system activities

1- CRM Inbox with list of leads including filtering on each status.

3- All clients contact information will be available

The screenshot displays a CRM interface. On the left is a sidebar with navigation icons for Home, Tasks, Contacts, Organizations, Leads, Opportunities, Projects, Emails, Calendar, Dashboards, and Reports. The main area is divided into two panels. The left panel, titled 'CONTACTS All Contacts', shows a table of contacts. The right panel, titled 'CONTACT Aaron Lang', shows detailed information about a specific contact.

	Full Name	Title	Phone
☐	Aaron Lang	CMO	(65) 64367228
☐	Albert Lee	Facility Manager	(970) 805-
☐	Barbara Lane	VP of Sales	(419) 176-
☐	Carlos Smith	CEO	(573) 957-
☐	Chris Chen	Property Manager	(497) 889-
☐	Cynthia Allen	Property Manager	(347) 369-
☐	Jason Castillo	Manager	(562) 428-
☐	Katherine Reyes	Manager	(34) 62205-
☐	Katherine Warren	Director	(626) 847-
☐	Lisa Parker	CEO	(510) 266-
☐	Maria Nichols	Facilities Manager	(202) 555-
☐	Mark Sakda	CEO	(334) 909-
☐	Michael Youssef		
☐	Nicholas Flores	Facility Manager	(44) 207-1
☐	Nicole Gomez	Finance Director	(714) 324-

CONTACT Aaron Lang

Details Related Activity

NAME AND OCCUPATION

Name: Aaron Lang
Organization: Clampett Oil and Gas, Singapore
Title: CMO

CONTACT DETAILS

Email: aaron.lang@clampett.com
Phone: (65) 64367228
Home Phone:
Mobile Phone:
Other Phone:
Assistant Phone:
Assistant Name:
Fax:
LinkedIn:
Facebook:
Twitter:

ADDRESS INFORMATION

Mailing Address: 10 Eunoss Road 8, Novena, 11, Singapore [map](#)
Other Address:

DATES TO REMEMBER

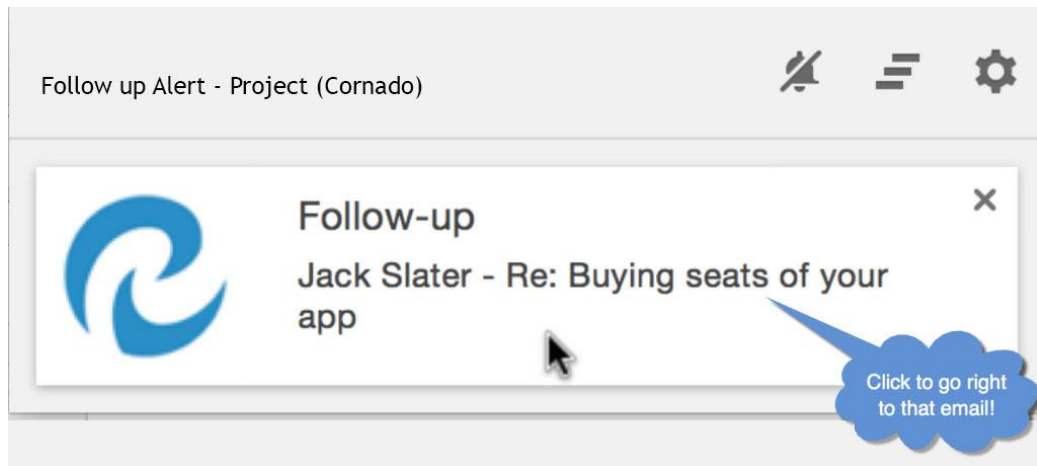
4- Complete Alerts and notifications module to help sales for not losing any open deal

The screenshot shows a 'Schedule Follow-Up Notification' dialog box. It has a title bar and a list of options for scheduling a follow-up. A red arrow points to the 'in 1 week' option. Below the dialog box, there is a text input field with the text 'Follow up about the 1000 watt'.

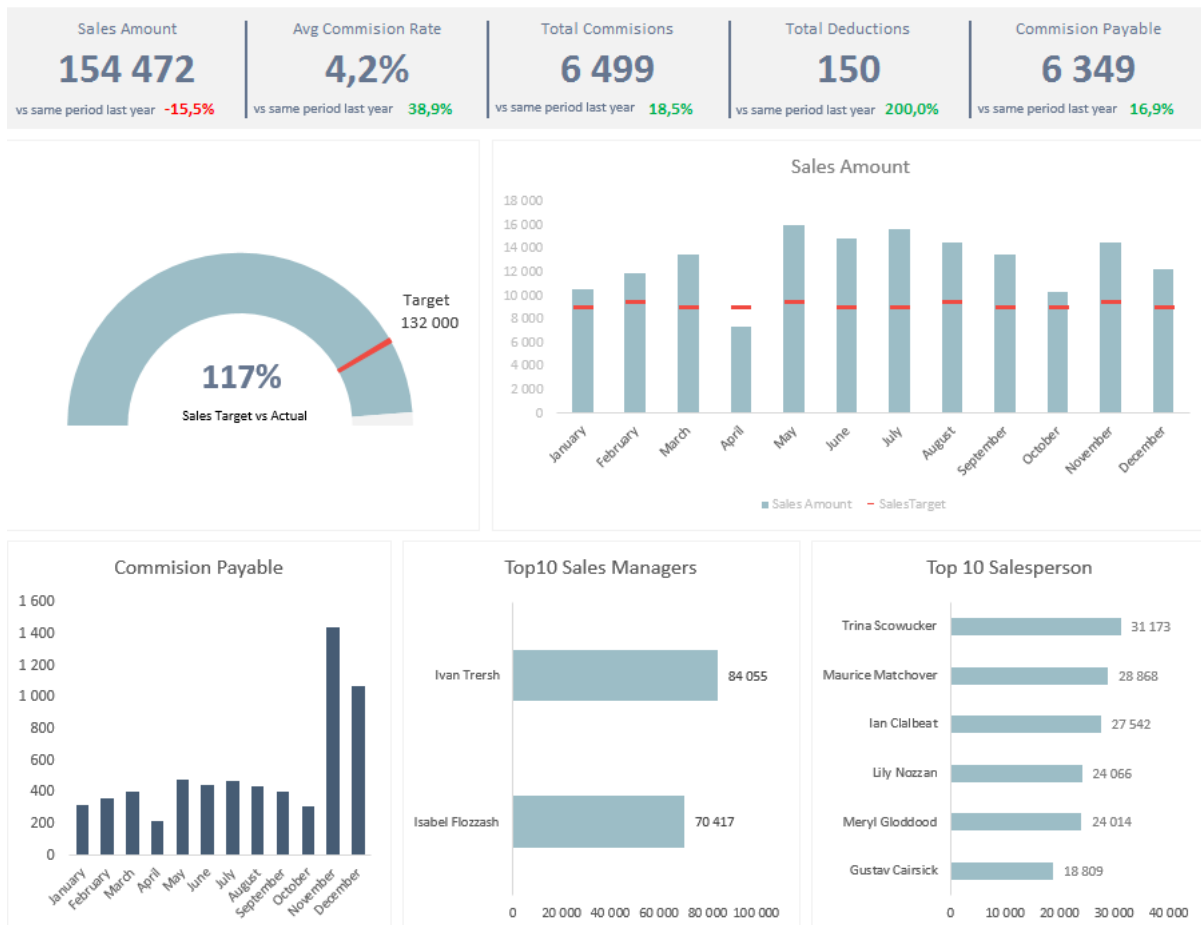
Schedule Follow-Up Notification

- ✓ at a specific time
- in 2 hours
- in 4 hours
- 8:00am tomorrow
- in 24 hours
- in 2 days
- in 1 week

Follow up about the 1000 watt



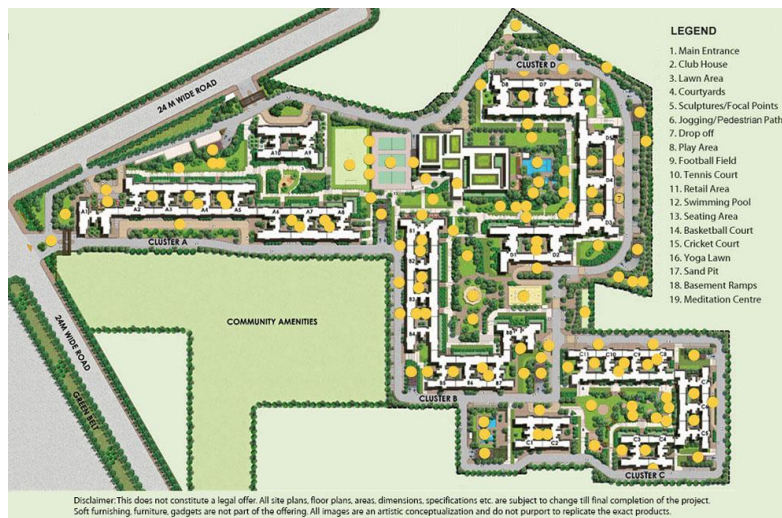
4- Reports and statistical For Sales Managers and Leaders



Reports and Dashboard will be customized based on your requirements

Sharing Center

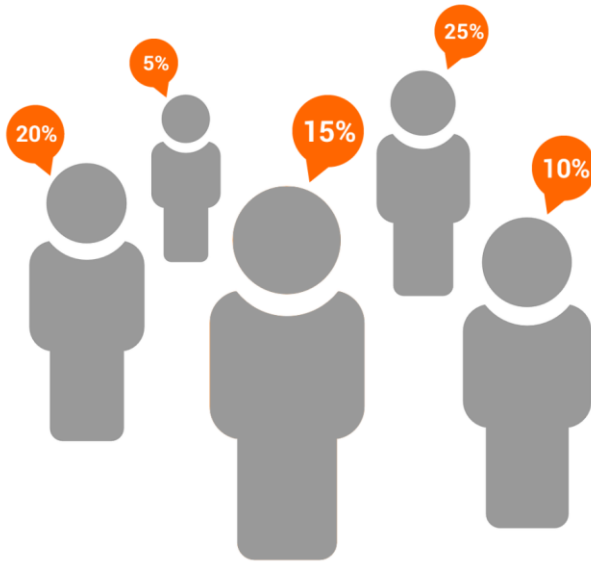
Will contain shared directory accessible by all sales and marketing team will help staff to easy access any project multimedia files.



Accountant

Accountant Users

System will give ability to check the final contract status and the Marketing and Sales initiator in order to calculate Commission



Company admin

Admin Users

Advanced ReportingNew ReportPower BILegacy Reports

Welcome to Advanced Reporting! Need help? Check out our [articles](#) or watch the video.

Report Folders

- My Personal Reports
- Shared Reports**
- All Reports
- Task Reports
- Contact Reports
- Organization Reports
- Lead Reports
- Opportunity Reports
- Project Reports
- Other Reports

Shared Reports

Search Reports

Report Name	Date Created	Created By	Scheduled
No items to display			

Our Customer Requirements:

Best Regards,