



Data Driven Decision Making

Features

Benefits / Advantages

Accelerate Sales

Improve customer Lifetime value

Discovery of New customers

Enhances Cross-Selling & Up-Selling

Improves Analytical Reporting

Simplified Sales Process

Enhances Customer Loyalty

Effective Internal Communication

Enhances Customer Service

Collaboration between teams

Increases Staff Productivity

Facilitates Remote Access

Lead Management

Lead Management ensures that the Sales team are always on top of all the leads and ensures that none falls through the crack

- *Capture complete Lead information* - Key attributes captured are Organization name, Contact Name, Industry classification, Category, Source, Priority and Status.
- Leads can be "Assigned To" a Sales representative.
- *Lead specific Notes*: this section provides flexibility to track the various notes one would like to register against the Lead.
- *Upload Documents*: this section provides flexibility to upload and store any kind of documents related to the Lead

Opportunity & Deal Management

- Create one or more opportunities against a specific lead. Key attributes like Probability, Status, Estimated deal value, expected closure date, Priority etc can be recorded for effective tracking. Notes & Document section captures key information about the opportunity.
- Create customer quote by linking the product and services. Quotes can be revised multiple times and the history information is tracked.
- On deal closure, a customer profile can be created for the opportunity and the quote can be converted into a customer sales order.
- Tight integration with Sales order & Inventory Module ensures seamless data flow from opportunity till deal closure, reducing manual data entry

Contact Management

- Contact management enables the sales representatives to capture all the contact details about the lead. Any number of contacts can be associated to a lead.
- Provision to send real time Sales & Marketing communication to contacts.

Dashboards

- CREST CRM provides various dashboards built on Opportunity and Leads. This is user configurable and the applicable dashboards can be enabled based on role.
- Lot of inbuilt reports are available which helps in viewing the data across multiple dimensions like Status, Priority, Stage, Source, Probability, Owner etc.

Activities Management

ACTIVITIES option enables the user to record and track activities against a Lead or Account or an Opportunity. Activities can be classified as "Event", "Call" and "Task", Activities are grouped and listed under different time buckets

- Today's activity, Next 7 Days, Overdue

User also have a provision to add Notes & Attach documents against an activity

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