FS – CRM Solution

= Customer Relationship Management = After Sales Support =
= Marketing = Sales = Customer Service = Inventory =

The FS CRM is a cloud hosted on demand solution that caters to all your customer relationship management needs through the following modules.

Sales Automation

Sales automation tools streamline the sales process by enabling managers and sales teams to organize leads, accounts and contacts; assess and prioritize opportunities; and oversee the sales pipeline and related analytics for forecasting, and much more.

- Lead Management
- Account & Contact Management
- Opportunity Management
- Sales Quotes

Marketing Automation

With the FS CRM marketing tools you can stay a step ahead of your marketing campaigns with improved integration and oversight.
The FS CRM has tools for

- Campaign management
- Mass e-mail marketing
- Online lead generation
- Sign-up forms,
- Product management tools for specialized or organization-wide marketing needs
- Calendaring & Activity Management
- Contact management
- Mail Merge Templates

Customer Support & Service

Enterprise quality customer support & service require enterprise quality tools. FS CRM provides

- Trouble ticket management
- Knowledge Base
- Customer self service portal integration
- Reports
- Support statistics

to enable your organization's support team to meet the needs of even the most demanding customers.

Inventory Management

The FS CRM extends beyond traditional CRM boundaries by offering:

- Complete sales cycle management
- Seamlessly integrating pre-sales and post-sales activities by linking inventory management functions
    - Products catalogues
    - Price books
    - Vendors & sales quotes
    - Purchase orders, sales orders, and invoices

The Futuresoft CRM Solution helps you manage your client data, client interactions, customer service, after sale-support activities, marketing efforts and so much more…
Our CRM solution is highly customizable and can help your company streamline interactions with your customers, to maximize sales.

SALES AUTOMATION - is an important CRM function that streamlines and enhances the operations of your sales team. Sales Automation includes the key activities needed by your sales team including Lead Management, Opportunity Management, Account & Contact Management, Sales Pipeline Management, Sales Forecasting, Sales Analytics, and others.

Lead Management: **Sales leads are a vital resource for sales and the FS CRM offers sales teams a full range of lead management functions.**

- Manage leads end-to-end (from creating leads to converting them into opportunities)
- Capture leads directly from your Web site and transfer to FS CRM
- Customize online lead form as per your organization requirements
- Import leads from external sources
- Add multiple products to the leads
- Qualify leads to next stage based on information captured in lead details
- Convert leads into sales opportunities, accounts, and contacts with a single-click
- Lead conversion mapping for all the custom fields
- Create fully customizable lead reports
- Export leads to spreadsheet software, such as Microsoft® Excel® for further analysis

Opportunity Management: **Opportunity Management is another important sales function covered by the FS CRM. Opportunities are labeled Potentials in FS CRM, which includes the following features for Opportunity Management:**

- Track all sales opportunities end-to-end in a sales cycle
- Associate opportunities with accounts, contacts & activities to have a better visibility on opportunities
- Generate quotes, sales orders, and invoices from the potentials
- Create fully customizable opportunity reports
- Export opportunities to spreadsheet software, such as Microsoft® Excel® for further analysis

The FS CRM gives you a detailed overview of your organization using the reporting features. Account & Contact Management helps you ensure company wide data that is uniform, while calendar & activity management helps you and your team plan better.

Account Management: **Track all accounts and related contacts, opportunities, cases, and other details from a common repository. This module has the following functionalities.**

- Specify parent-child relationships between accounts and their subsidiaries or other divisions
- Generate quotes, sales orders, and invoices for the accounts
- Track purchase history of the customers and analyze opportunities for up selling and cross selling
- Create fully customizable account reports
- Export accounts to spreadsheet software such as Microsoft® Excel®, for further analysis
- Attach customer-specific documents to accounts for a quick reference in future

Reports & Dashboards: **Use reports & your dashboard to understand your organization better and improve processes.**

- Pre-build reports for sales automation
- Sales pipeline analysis by stage
- Monthly Sales pipeline analysis
- Sales opportunities by lead source
- Drill-down the dashboards by time and opportunity stage

MARKETING - Your marketing campaigns deliver your leads, qualify a lot of them, and are frequently used to retain or business. It's critical to know which campaigns are working and which aren't.

Email Marketing: **Drip email-marketing campaigns - qualify leads in ways that were otherwise impossible.**

Running email-marketing campaigns is one of the easiest, most effective ways to get new and recurring business. By educating leads that you collect from web forms, .CSV imports, and manual imports on your products and services, you'll help them find a match between their needs and your offerings. Additionally, updates, deals and incentives can be emailed to encourage repeat business. Integration with bulk mailing solutions like mailchimp are possible.

Contact Management: **Track all contacts and related opportunities, cases, activities, and other details from a common repository**

- Create the hierarchy of contacts within a company to have a better coordination while dealing with customers
- Export contacts to spreadsheet software, such as Microsoft® Excel for further analysis
- Synchronize contacts with Microsoft® Outlook®

Calendar and Activity Management: **Add all important customer-related e-mails to FS CRM for quick reference in future**

- Store all the details of customer meetings and calls in an intuitive calendar
- Manage daily tasks of the FS CRM users to have a streamlined sales process

A positive experience means that a customer is far more likely to purchase from you.

SUPPORT – A large part of customer satisfaction is ensuring that your customer has access to quick, convenient answers whenever problems with your products or services arise. A tailored customer support portal ensures that you customers can quickly and conveniently search through common issues and resolutions, and if need be, create, document, and track their issues, letting them know that your business is both organized and professional and puts customer needs first. In order to permanently reduce the number of issues reported by customers, action must be taken at the sales and product steps to eliminate issues discovered by customers.

Customer Portal - Provide customers with individual access to tailored Customer Portals enabling your customers to submit Trouble Tickets for creating better customer relationship and issue tracking and allow them to view Invoices, Quotes, Products, Services, FAQ's and Documents which are related to them and their organizations.

Knowledge Base / FAQs - Building a knowledge base can provide your customers with fast access to answers to their questions, freeing up time for your support personnel to deal with new and unique issues.

Support Workflow Automation - It's oftentimes true the case that one or two customer issues can be forgotten. This can be devastating for your customer relationship and retention, and your company's image. Build workflows to ensure that if reported issues remain idle for too long a notification is sent to your support team. Additionally, automate repetitive tasks to take some of the load off your support team.

View Customer History - Much like doctors do, studying customer histories can provide crucial information about how a particular issue originated and can lead to swifter, more comprehensive resolutions. With information about the sales process, any customizations that might have been done, and any other historical customer information, issue diagnosis and resolution, especially for long-term customers, can become a smooth process.

Business Development & Strategy Insights - Oftentimes repeat issues must be addressed by product teams. Build a knowledge base of solutions to common problems for customers to see and take those issues to business unit leads to ensure that there is a complete understanding within the business of the predominant customer issues.

Using FS CRM you can achieve the seamless integration between pre-sales and post-sales activities in a single application.

INVENTORY – Manage all your products from one central repository that is linked to all your sales, marketing and support.

Product Management

- Manage organization-wide products
- Import product details from other applications
- Create custom product fields
- Attach product-specific documents
- Upload product images for easy identification
- Export product details to Microsoft® Excel® for further analysis
- Procure products from the selected vendors list

Sales Quotes

- Track outstanding quotes from the quotes list view
- Add line items to the quotes and update subtotal, taxes, adjustments, grand totals etc.
- Select different prices for the same product as per customer segment
- Create printer-friendly Sales Quotes and deliver to the prospect customers via E-mail
- Create Sales Order or Invoice with a single click from the Sales Quote
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses
- Display quotes related to accounts under the related list
- Customize Sales Quote fields as per your organization's requirements

Order Management - Streamline your organization-wide procurement and fulfillment processes with integrated approach of the FS CRM

- Procure products from the best available Vendors/Manufacturers/Resellers list
- Manage up-to-date stock position
- Track outstanding orders from the orders list view
- Customize Purchase Order (PO) and Sales Order (SO) fields
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses
- Add line items to the Orders and update subtotal, taxes, adjustments, grand totals etc.
- Create printer-friendly Order (PO/SO) and deliver to the Vendors/Customers via E-mail
- Once the Sales Order is accepted, create Invoice from Sales Order with a single click
- Periodically notify the stock position so that stock is always available to fulfill orders

Invoices

- Track outstanding invoices from the Invoices list view
- Create printer-friendly Invoices and deliver via email
- Add line items to the Invoice and update subtotal, taxes, adjustments, grand totals, etc.
- Customize Invoice fields
- Avoid duplicate work by dynamically displaying the Billing and Shipping addresses of the customer while creating invoices
- Associate invoices with the General Ledger account for hassle-free Book Keeping

Integration with Accounting Software

The FS CRM solution allows customization that helps integrate the CRM with state-of-the-art accounting packages like Quickbooks and Peachtree.

Automate your sales, marketing and customer support workflows using the FS CRM solution.

CONTACT US TODAY!

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