



TECHJET
SOLUTIONS

Web Designing

Remote Staffing

Software Development

Outsourcing / Offshore
Development



TECH CRM
DEVELOPMENT / CUSTOMIZATION / IMPLEMENTATION
SERVICES



TECH CRM

TECH CRM Features

- ✓ Marketing Automation
- ✓ Sales Force Automation
- ✓ Sales Quotes, Orders and Invoices Management
- ✓ Calendar and Activities Management
- ✓ Customer Support. Helpdesk, Trouble Tickets Management
- ✓ Product and Price Book Management
- ✓ Purchase and Inventory Management
- ✓ Administration and Security Management
- ✓ Analytics Graphs, Reports and Dashboard
- ✓ Outlook / Thunderbird Integration

TECH CRM is a full featured web-based, platform independent, CRM (Customer Relationship Management) System based on leading OpenSource technologies. TECH CRM is an ideal CRM Solution for small and medium sized businesses, with a rich set of features and functions, on a customizable and secure platform, for all your daily business needs.

TECH CRM supports your company's internal processes and employees in Sales, Marketing, Customer Service, Purchase, Inventory, back-office personnel and better organe your customer data such as Accounts and Contacts, Sales Leads, Potentials and Pipelines, Quotes, Sales Orders, Invoices as well as Trouble Tickets and Products knowledgebase, Price Book, Inventory and much more.

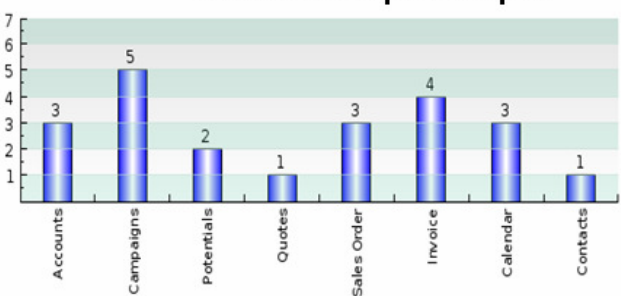
All your company data related to customer, pipeline, sales forecasts are only a click of a button away for the management. This access to knowledge gives you ultimate visibility and transparency of all your key customer, appointments, correspondence (yours & your teams), as well as all activities (including emails), marketing campaigns, opportunity pipelines, sales team targets and achievements as well as customer trouble tickets and complaints.

TECH CRM leverages on all these benefits and offers best off-breed solutions adding high value to your investment giving best "price-to-performance ratio" as well as provides higher stability, better access protection, higher performance and overall better functionality, than traditional, commercial based solutions.

Menu & Functionalities

My Home Page ▾	Marketing ▾	Sales ▾	Support ▾	Analytics ▾	Inventory ▾	Tools ▾	Settings ▾	Quick Create... ▾
Home	Marketing Flow	Sales Flow	Support Flow	Analytics Flow	Inventory Flow	Tools Flow	Settings	
Calendar	Campaigns	Leads	Customer Complain	Dashboard	Products	RSS		
Webmail	Accounts	Accounts	FAQ	Reports	Vendors	My Sites		
	Contacts	Contacts	Accounts		Price Books	Documents		
	Webmail	Potentials	Contacts		Purchase Order			
	Leads	Quotes	Products		Sales Order			
	Calendar	Sales Order	Documents		Quotes			
	Documents	Invoice	Webmail		Invoice			
		Products	Calendar					
		Price Books						
		Documents						
		Calendar						

Dashboard Graphical Report



Module	Count
Accounts	3
Campaigns	5
Potentials	2
Quotes	1
Sales Order	3
Invoice	4
Calendar	3
Contacts	1

Create Custom Reports

1. Report Details
2. Related Module
3. Report Type
4. Select Columns
5. Specify Grouping
6. Calculations
7. Filters

Report Name:

Report Folder: Account and Contact Reports ▾

Description:

< Back
Next >
Cancel

Marketing Campaign Management

- Create and manage organization-wide Campaigns
- Target market and audience
- Personalized mass mailing campaign
- Manage mailing list
- Create and save HTML templates
- Campaign types, status, tracking
- Response, sales, ROI, Product
- Receive enquiries directly from internet online forms
- Add & associate Contacts, Leads, Potentials, Activities, List management

Account Management

- Create Accounts for particular prospective client organization
- Search/Import/Export Accounts
- Track purchase history
- Analyze cross selling opportunity
- Send email to Accounts
- Add & associate Potentials, Contacts, Products, Activities, HelpDesk, Attachments, Quotes, Invoices, Sales Orders

Contacts Management

- Create Contacts for particular account
- Search/Import/Export Contacts
- Online Contact capture form
- Email Contacts
- Track opportunities, cases, activities for each contact
- Create contacts hierarchy within a company (account)

Activity Management

- Manage interactions in calendar
- Create tasks, meetings, calls and track it on the calendar
- Activity Reminders
- Store all the details related to particular meeting, call, tasks

Leads Management

- Create and manage Leads
- Search/Import/Export Leads
- Online Lead capture form
- Qualify lead to next stage
- Convert Lead into potential opportunity, account and contacts
- Create customizable leads report
- Add & associate Activities, Attachments, Products, Campaigns

Potentials (Opportunity) Management

- Quality leads to create Potentials
- Search for Potentials
- Qualify, source, status, stage, probability, pipeline
- Create quotes, sales order, invoices from Potential
- Track sales stage history
- Create customizable opportunities report

Products Management

- Create and manage organization wide products
- Create custom product detail fields
- Attach product-specific documents
- Product images for easy identification
- Create Price Books
- Procure products from the selected vendors list

Quotes

- Create Quotes for opportunity
- Select different prices for the same product
- Add multiple products and update subtotal, taxes, grand total etc
- Create Invoice and Sales Order from Quotes
- Terms and conditions
- Add Products, calculate prices, taxes
- Add & associate Sales Orders, Activities
- Track Quote status history

Order Management

- Streamline organization-wide procurement processes
- Create Sales Orders
- Procure products from the best available Vendors
- Manage sales order delivery
- Once sales order is accepted create invoice at one click
- Add & associate Attachments, Activities, Invoices
- Track outstanding sales orders
- Track Sales Order status history
- Manage up-to-date stock position by seamless integration between order fulfillment and available stock in your warehouse

Invoices

- Create Invoices from sales order
- Search and track Invoices
- Terms and conditions
- Add Products, calculate prices, taxes
- Add & associate Attachments, Activities
- Track Invoice status history

PriceBooks

- Create PriceBooks
- Search for PriceBooks
- Add & associate Products

Vendors

- Create Vendors
- Receive quotation, release purchase order, register invoices
- Add & associate Purchase Orders, Products, Contacts

Ticket Management

- Create and track trouble tickets
- Assign trouble tickets to support person
- Associate trouble tickets with accounts, contacts, products etc.
- Create fully customizable ticket reports

Administration

- SSL Secured 128bit encrypted access
- User based unique, secure login
- Access hierarchy and data sharing control
- User based access / visibility rights
- Define roles and assign role specific permissions
- Define groups allowing easy management of accessing and sharing
- Field / Role / Profile based visibility and access rights
- Multilingual
- Multicurrency

Other Features

- Dashboard and Analytics
- Basic and Advanced Search
- Integrated Email Client
- User Personal Preferences
- International Clock
- Calculator
- User Chat

Advantages of TECH CRM

TECH CRM Major Advantages

- TECH CRM can help your business streamline interactions with your customers, to maximize sales and improve customer service.
- Maximize business from your leads by assigning ownership to your employees and drive results by convert them to prospects enabling efficient management of sales pipeline.
- Help sales team organize activities and follow up tasks as well as better manage accounts, contacts, and opportunities.
- Get full picture and improve performance and streamline your sales engine to virtually increase your business.
- Analytical tool to provide your employees and management with graphical representation and charts on the status of each stage in the business process
- Every user can define, create and save personalized reports as per their requirements. Moreover reports can be generated in various forms like CSV, PDF etc.

Technology Advantage

- TECH CRM uses PHP/MySQL platform which is one of the most popular and widely used open source programming language across the globe
- TECH CRM can be hosted both on internet as well as local intranet as per the clients need
- TECH CRM is platform independent and can be hosted either on Windows or Linux platforms.
- Easy to use, web-based platform and is compatible and accessed by all leading web browsers such as IE, Mozilla Firefox, Opera etc.

Flexibility, Extensibility and Scalability

- TECH CRM can be customized to suit your business process and precisely meet your requirement.
- New functionalities can be custom developed and integrated easily with TECH CRM Solution.

Security

- SSL secured web access as well as Access Control for information restriction
- User based unique, secure login
- Access hierarchy and data sharing control role specific permissions
- User, Field, Role, Profile based visibility & access rights
- If hosted on local intranet then data stored locally and more securely

Ownership Model

- TECH CRM is available along with source code for as low as US\$ 935 when compared to other CRMs which requires paying minimum 10 times more.
- TECH CRM ownership comes with unlimited number of user licenses and complete source code
- There are no additional charges for software or high user licensing cost involved with TECH CRM as it is based on open source platform.
- There is no need of any additional hardware or software requirements thus reducing the cost of same.
- By hosting on Linux Server, high recurring Microsoft licensing cost can be reduced to minimal
- This reduces up front expenditures by more than 60% and recurring expenditure by 80%.

User License Model

- We at Techjet Solutions understand the budget constraints faced by companies and thus offer SAAS (Software as a Service) Model by which you can buy TECH CRM licenses as per your need
- TECH CRM is also available on "pay per license per year" providing you to reap benefits of TECH CRM at an incredible and astonishing low cost.

Other Advantages

- Suitable for business of all size
- Short implementation times and quick ROI (Return On Investment)

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