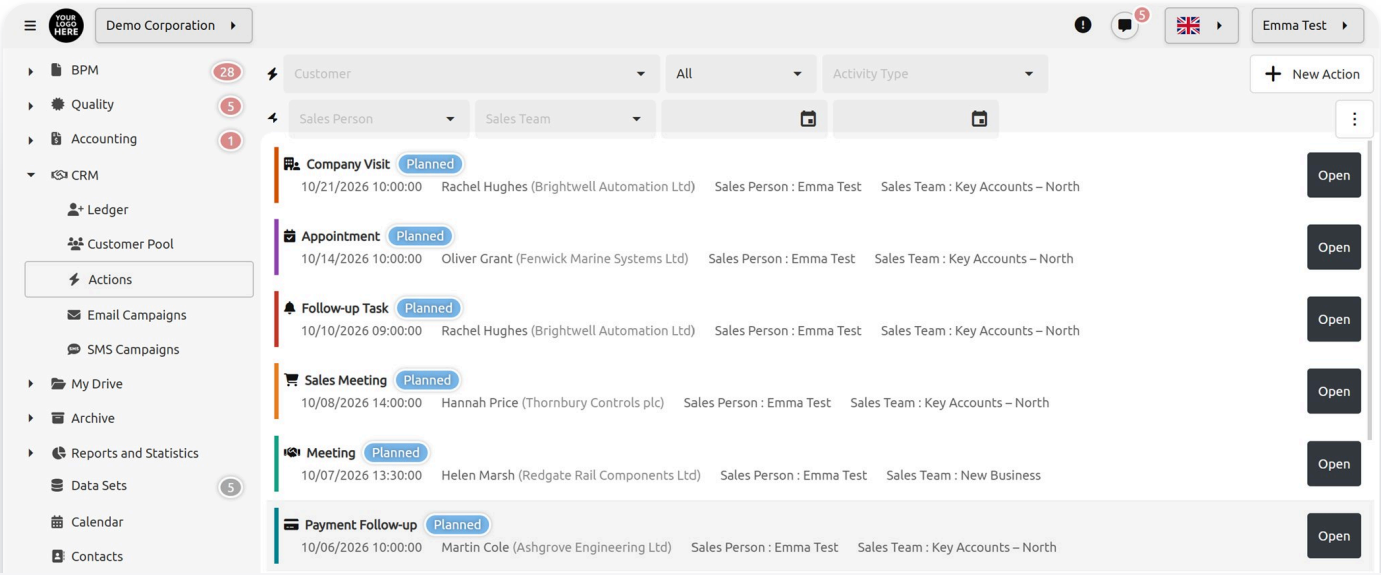
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MODULE

Customer Relationship Management System

Leads | Customer Pool | Actions | Sales Teams | Email and SMS Campaigns



Get to Know Documenos® Customer Relationship Management.

Collect your leads, distribute them to your sales representatives, record every call and visit, and send your campaigns. Documenos® CRM works on the same platform as your documents, calendar and accounting.

Modules That Feed the CRM

Directory
Corporate contact and company directory

Campaigns
Email and SMS campaigns

Accounting
The same customer in quotes, orders and invoices

1

Leads

New records enter the pool together with their source (website, trade fair, referral, social media...) and a score.

2

Assigning to a Representative

Records are assigned in bulk to a sales representative and, if you wish, to a sales team.

3

Customer Pool

The representative works with the customer, enters actions and updates the status.

4

Outcome

Every record has a clear status: in progress, completed, failed, lost or archived.

Features

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Email Campaigns

Build emails with the drag-and-drop designer, write the content in ten languages and send a test message. Send to everyone at once or in batches at intervals, and track the number of messages sent and opened.

SMS Campaigns

Run text message campaigns through your configured SMS provider with the same targeting and sending options.

Targeting and Unsubscribe

Choose the target audience from directory folders or individual contacts. People who unsubscribe are automatically excluded from subsequent email and SMS campaigns.

Sales Teams

Set up sales teams with multilingual names, define their members, and set teams as active or inactive.

Everyone Sees Their Own Customers

A representative without the relevant permission sees only their own customers and actions; the rule is also enforced on the server.

Granular Permissions

Separate permissions for campaigns, leads, the customer pool, assignment, actions, action types and sales teams.

Ready for Reporting

Customer and action data is transferred to the business intelligence database and can be used in your reports and dashboards.

Design Your Own Action Types

Start with 22 ready-made action types or create your own: set a colour, an icon and a default duration, and add type-specific fields. Types can be exported and imported to move them to other installations.

Meeting
Appointment
Phone Call
Meeting
Other Meeting

Visit
Company Visit
Customer Visit

Sales
Demo / Product Presentation
Sales Meeting
Quote Discussion
Quote Sending
Supplier Presentation
Contract Processing

Follow-up
Payment Tracking
Follow-Up Task
Task Completion
Status Update

Communication
Email
Messaging
Note

Support
Support Request
Complaint
Customer Feedback

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See the full module and its screenshots on our website.

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