Customer Relationship Management (CRM)

Grow Business Digitally

DolaTech Empire, 926, Gala Empire, Drive In Rd, Gurukul, Ahmedabad, Gujarat 380052

32+ Key Features

Admin panel

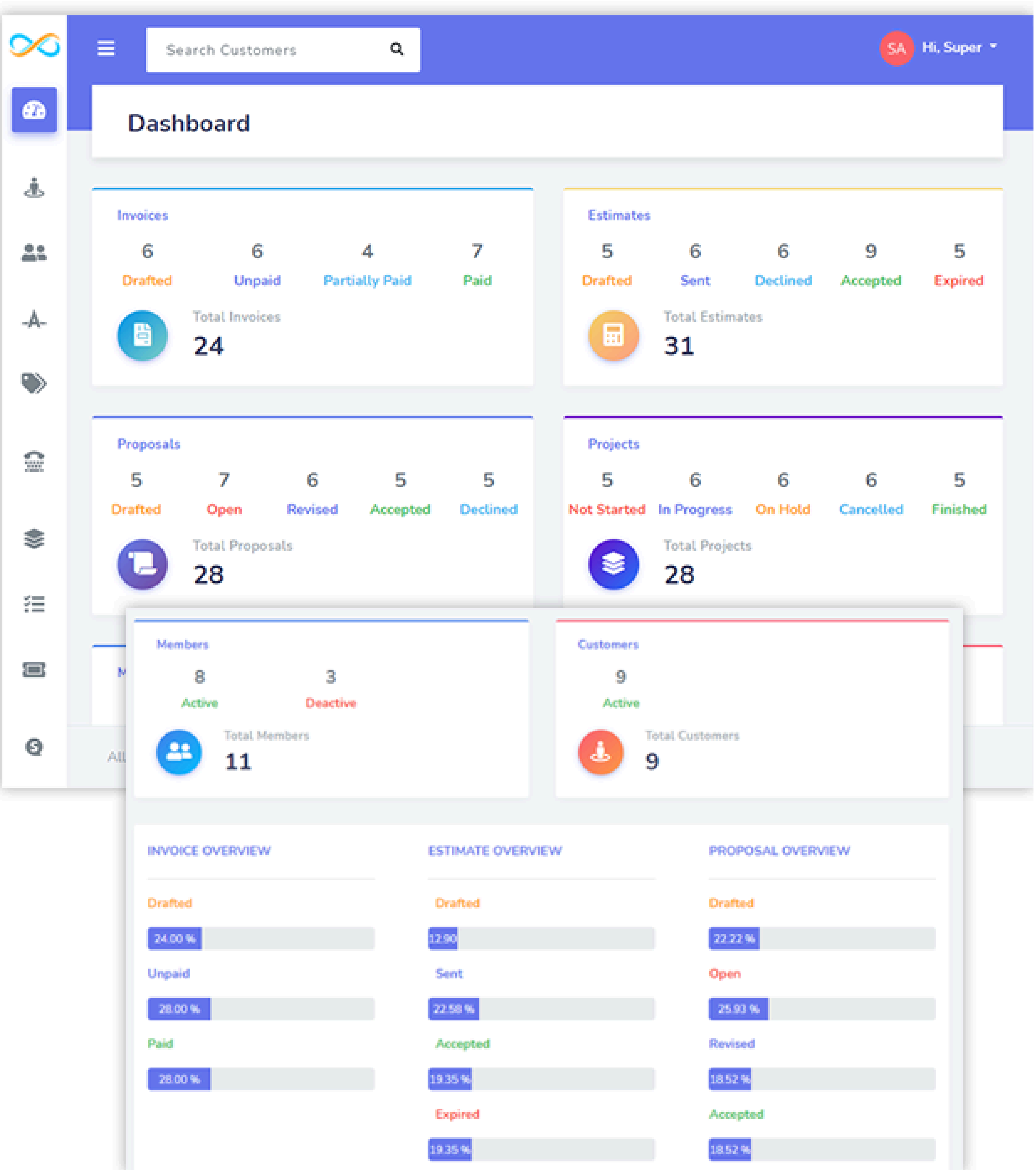
- Dashboard
- Customers
- Members
- Articles
- Tags
- Leads
- Projects
- Tasks
- Tickets
- Invoices
- Credit Notes
- Proposals
- Estimates
- Invoice Payments
- Departments
- Expenses
- Payment Modes
- Tax Rates
- Products
- Announcements
- Contracts
- Goals
- Services
- Settings

Client panel

- Dashboard
- Projects
- Invoices
- Proposals
- Contracts
- Estimates
- Announcements
- Multi-languages

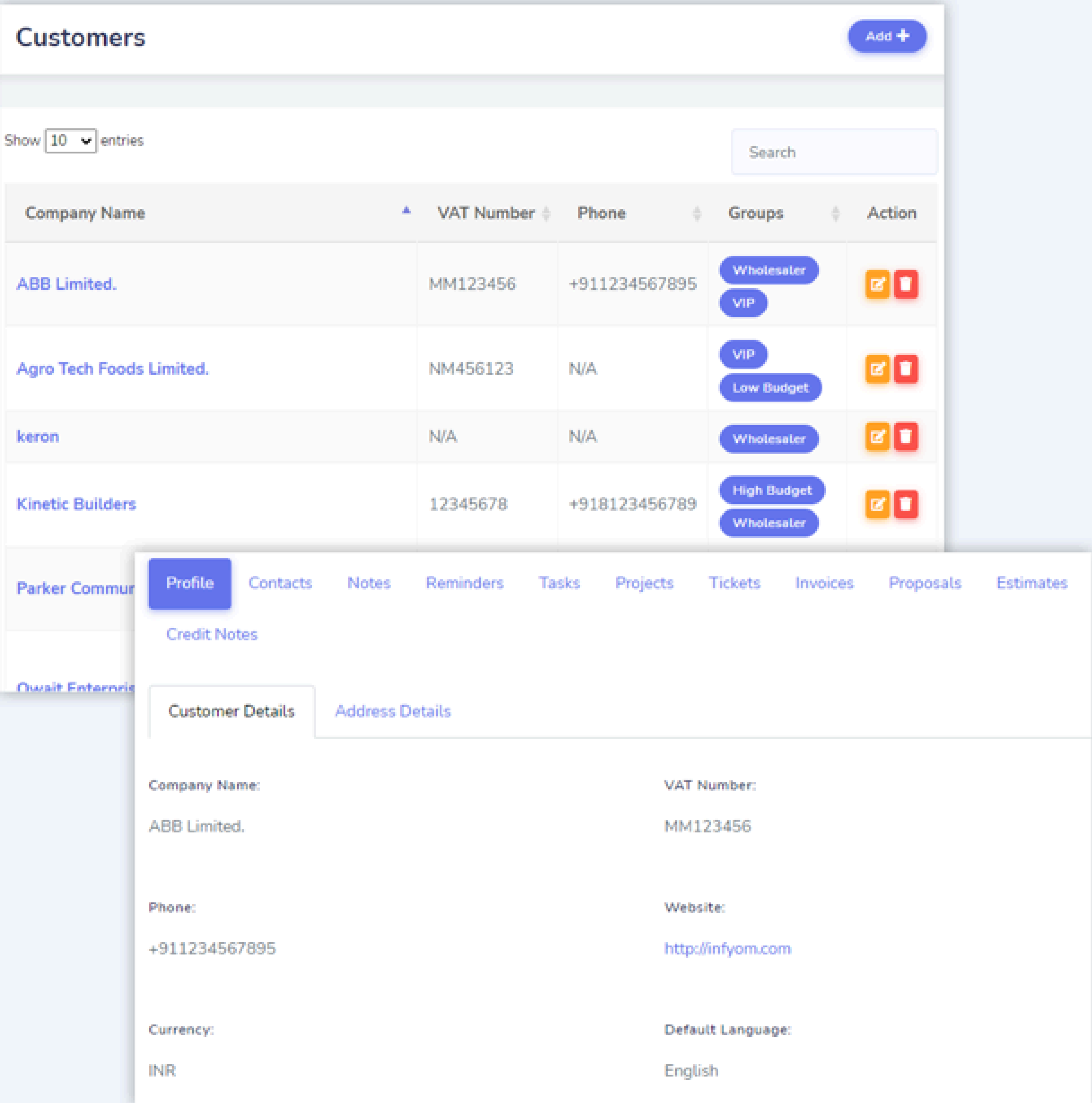
Dashboard

Beautiful visual dashboard for an admin to have a full overview of a whole system with all the statistics you need.



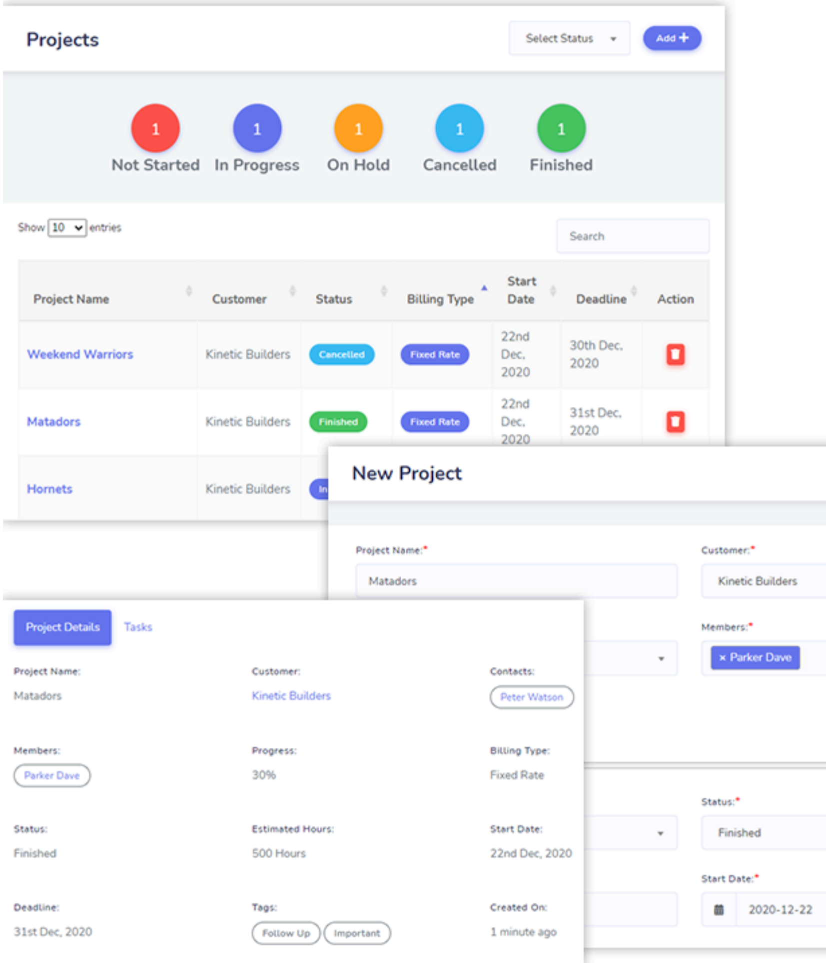
Customers

Manage all customers from here. 360 Degree detailed customer screen to view all associations of the customer.



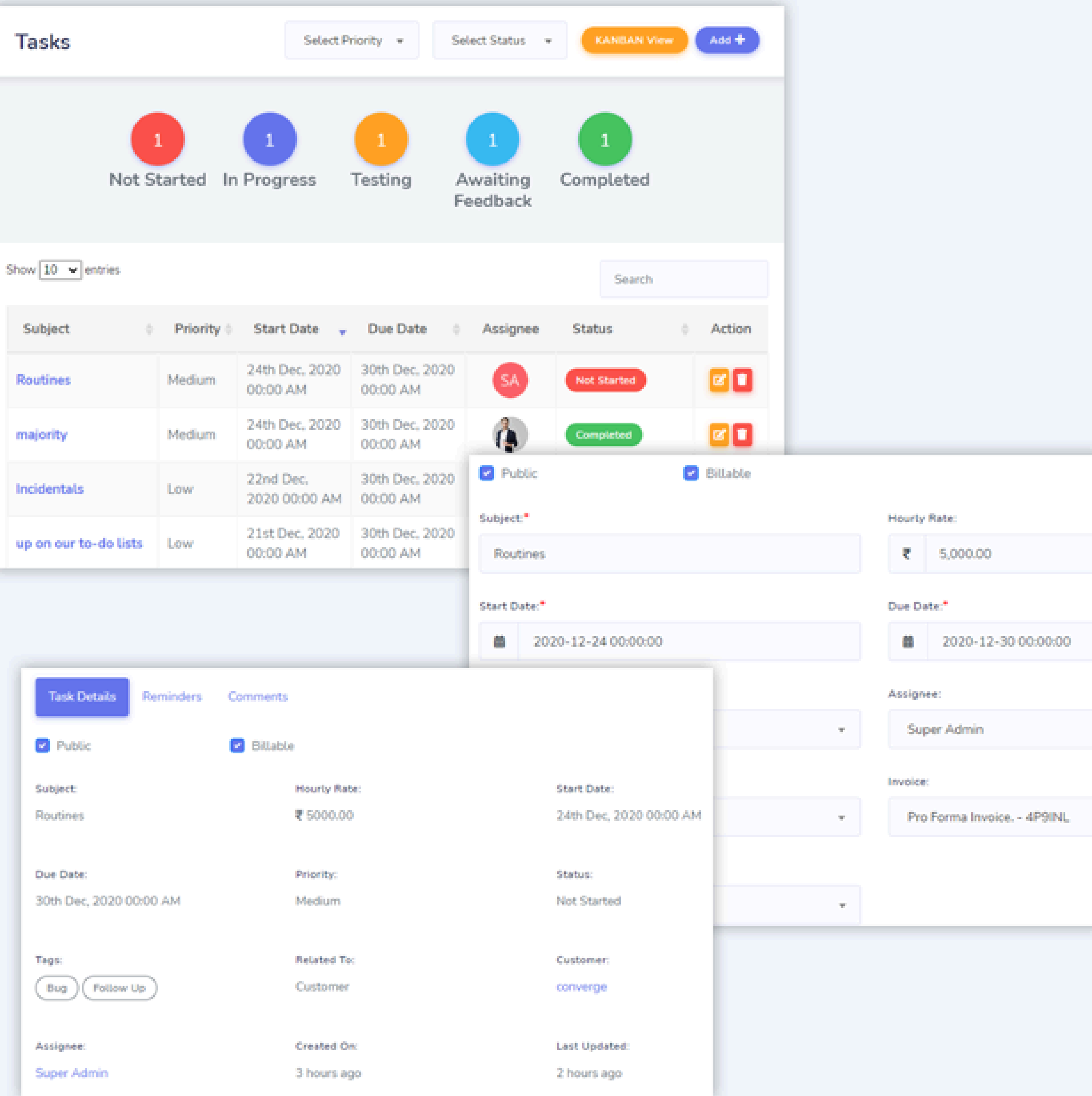
Projects

Manage all your ongoing projects from here to deliver work in a timely manner with full clarity of who is doing what.



Tasks

Create and share the invoices with clients for the work you've done and get paid in a time.



Estimates

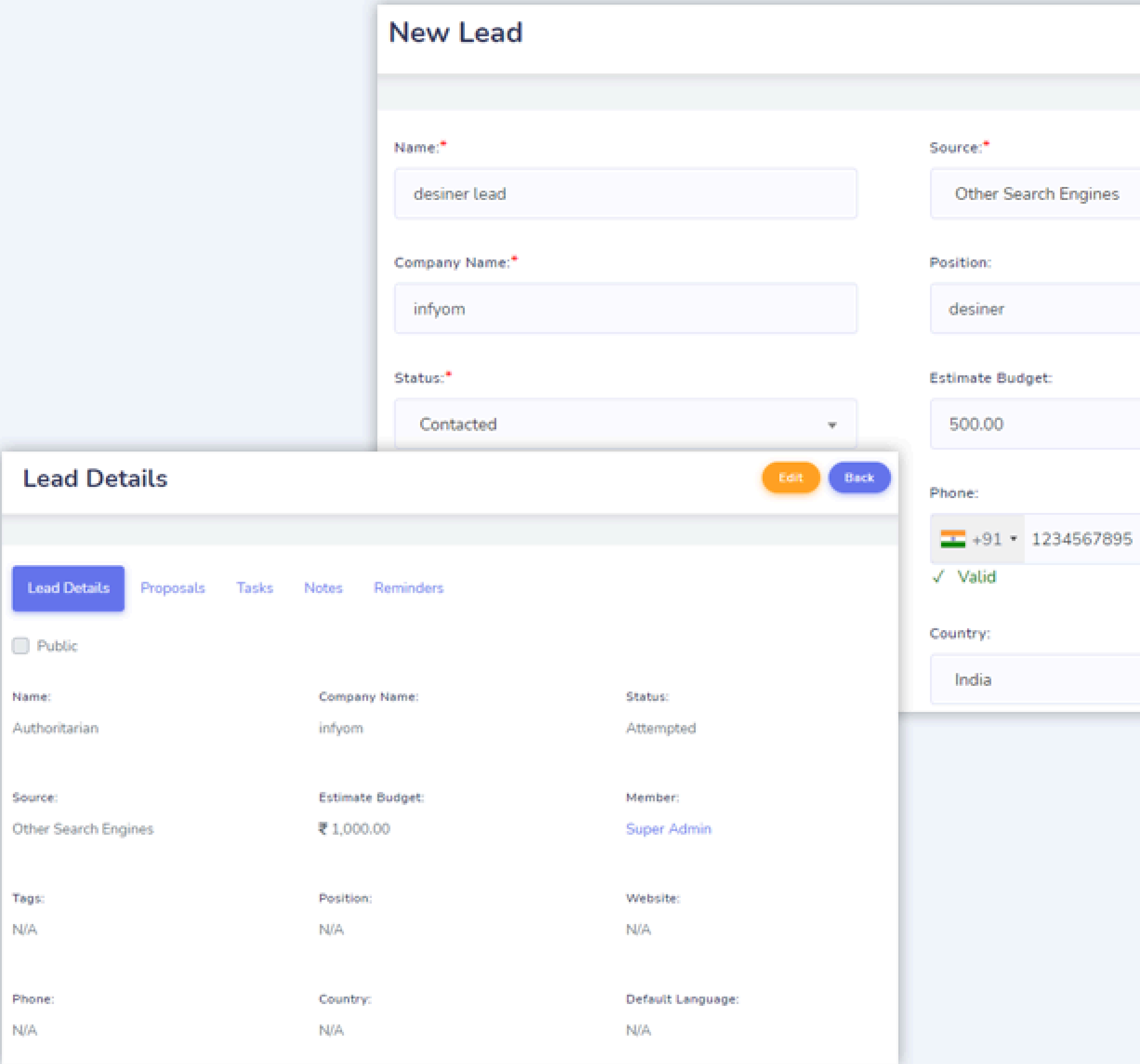
Create project estimates to give clarity about the cost before your clients get started with the project. It creates more conversions.

Proposals

Create Proposals of products for your customers to finalize the estimates and then directly convert them to invoices.

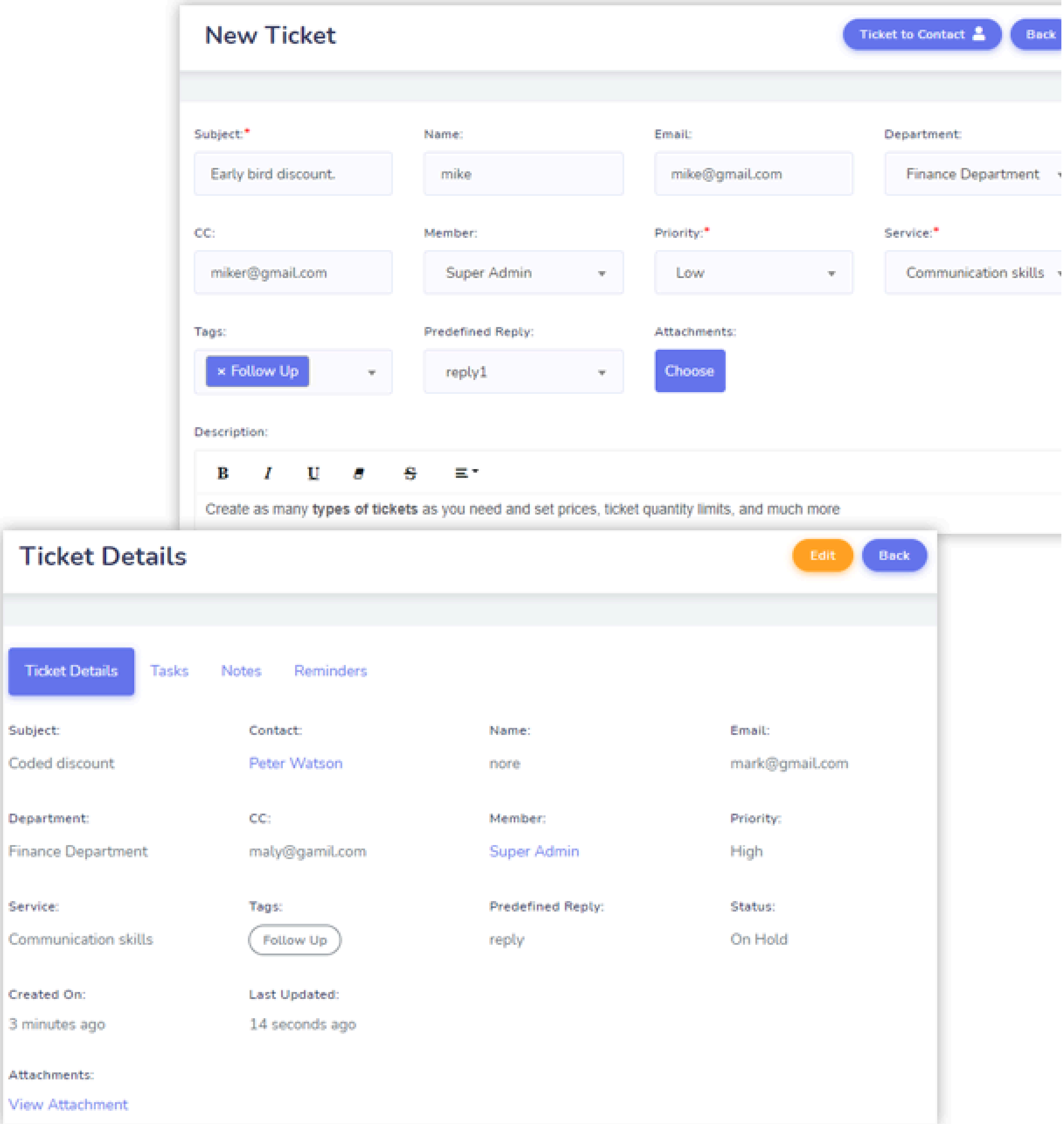
Leads

Track your leads (opportunities) with a visual Kanban and List view and convert them to conversions once leads are converted.



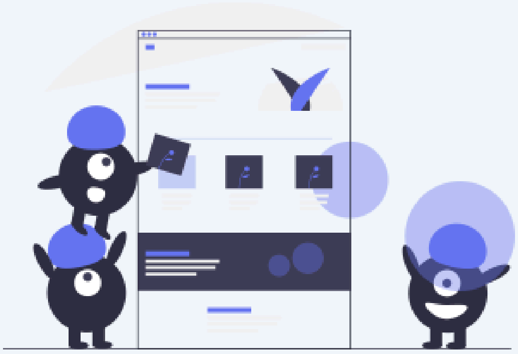
Tickets

Give support to your customers right from your desk within CRM. No need for any extra software for support Tickets.



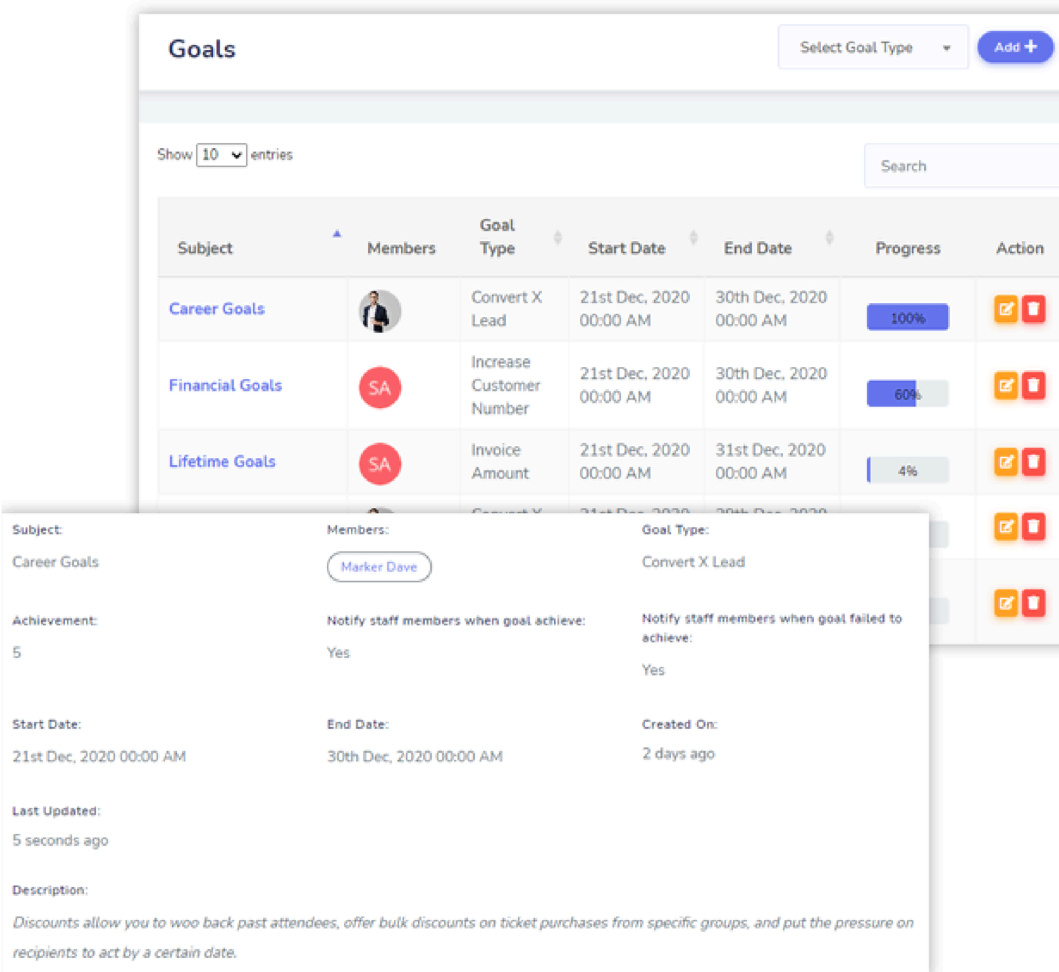
Expenses

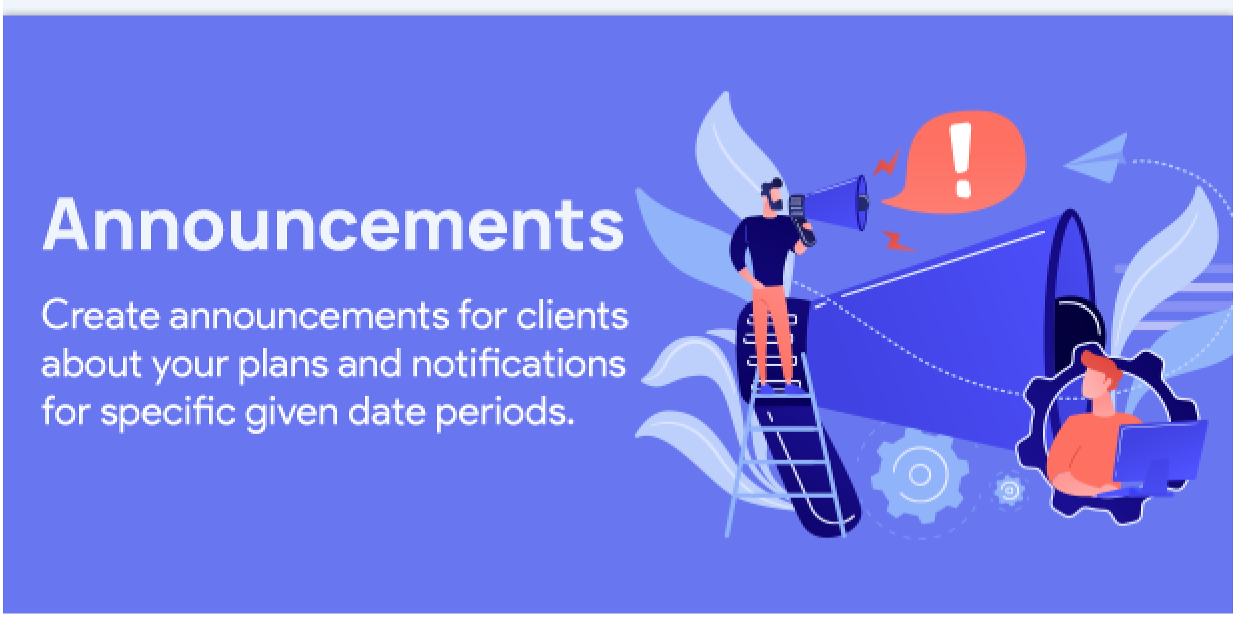
Manage all your expenses to have a better idea of financials by categorizing them.



Goals Tracking

Setup a goal for lead conversations, customers acquired and invoices to be collected and automatically track the progress.





Admin panel

Dashboard

Beautiful visual dashboard for an admin to have a full overview of a whole system with all the statistics you need.

1. Invoices – How many invoices drafted, unpaid, paid, etc.
2. Estimates – How many estimates were sent, declined, accepted, etc.
3. Proposals – How many proposals open, revised, accepted, etc.
4. Projects – How many projects started, not-started, finished, etc.
5. Members – Active members of the system.

Customers

Customers are actually a company, they can manage their personal details like,

- Contacts
- Notes
- Reminders
- Tasks
- Projects
- Tickets
- Invoices
- Proposals
- Estimates
- Credit notes

Members

Members in CRM are the users who are responsible to lead the conversation and many other activities. Admin can create members with different permissions.

Articles

Admin or users who have permission to create Articles can create articles. Admin should be able to edit/delete all articles while the other users can see only his articles.

Tags

You can see the list of all tags used in all projects, proposals, estimates, tasks, etc. You can create new tags from here and can edit and delete existing ones.

Leads

Leads are actually the opportunity of customers who not yet did any deal with the company.

You can see the lead through the Kanban view and move that lead from one status to another status. Lead can also be filtered according to lead status. Lead can be assigned to any member.

Once Lead is ready to deal with a company you can convert a lead to a customer.

Projects

Each Project must be associated with the customer and members. You can create a new project from this section and can edit and delete existing ones. You can create a project by giving the billing type option, an option like Fixed Rate, project hours, task hours.

Tasks

Once the project is started, all we need to do is define tasks. The task may have,

- Subject
- Hourly rate
- Assigned Date
- Due Date
- Priority
- Related to
- Tags
- Description

You can also assign a task to team members if you need them. You can select the option which has a related task such as invoice, customer, ticket, project, lead, proposal, etc.

Tickets

Admin or user who has permission to create tickets can manage the tickets module. You can create a ticket to track customer requests.

Tickets without Contact and Ticket to Contact, these two options can be used to create a ticket. You can assign tickets to your member priority-wise, and the user is also able to attach files to the ticket.

Invoices

You can create an invoice from the product you have added to the product module. Also, you can directly assign the invoice to the client. You can manually add the item to the invoice and also download it as a PDF and send it to the client.

There are many options available for invoice creation. One of them is the Discount type. We are supporting 2 discount type options.

- Before Tax
- After-Tax

By using the before tax option, your discount will be applied to invoice subtotal before applying the tax of the item.

By using the after-tax option, your discount will be applied to invoice subtotal which actually included the tax too.

You can also change the invoice status to paid by paying the full amount. If you don’t want to pay the full amount then it will be considered as partially paid.

Credit Notes

You can create a credit note from the product you have added to the product module. You can manually add the item to the credit note.

Proposals

You can create a proposal from the product you have added to the product module. you can manually add the item to the proposal. You can also convert the proposal directly into an invoice and estimate.

Estimates

You can create an estimate from the product you have added to the product module. You can manually add the item to the estimate. you can directly assign the invoice to the client. You can also convert the estimate directly into an invoice.

Invoice Payments

Invoice data show invoices you have paid and invoices that have been partially paid.

Departments

Departments are useful when you need to divide tickets department-wise. Like the Finance Department, Marketing Department, Purchase Department, etc. You can create a new department from here and can edit and delete existing ones.

Expenses

By using this module you can record your expense category and amount. You can store it with a specific customer, currency, payment mode, expense date, and attach a document related to it.

Payment Modes

When you pay for an invoice, you can easily make a payment using the payment mode. You can create a new payment mode from here and also can edit and delete existing ones.

Tax Rates

Taxes are used while creating invoices, estimates, proposals, products. You can create taxes with its amount here.

Products

Create and manage your business products from here. You will be able to create invoices, proposals, and estimates from the created product and you can also manage that product group wise.

Announcements

Create the announcement that you want to show to the client-side, and you can also change the status of that announcement if you do not want to show the announcement.

We have added cron for announcements, so it will be auto-published at a given time.

Contracts

You can create a contract with the contract type and contract amount. And also assign the contract to the customer. You can also create a contract from here and also can edit and delete existing ones.

Goals

Once a goal has been created, the goal is dynamically tracked and the goal will be tracked based on the goal type you have selected. Goals will be fully tracked from the start date and end date.

We are supporting some default goal types. e.g Convert x Leads, Paid x Invoices, etc.

Services

You can create a new service from here and can edit and delete existing ones.

Settings

CRM provides various settings to control your branding and other general items.

- Application Name
- Term & Conditions
- Company Logo
- Favicon Icon
- Company Name
- Company Email
- Company Phone
- Company Address
- Company City, State
- Admin Note
- Client Note

External Brief

- Frontend responsive website with user friendly
- Admin Panel to manage from CRM
- Responsive Admin to usable any Mobile Devices
- Responsive Client to usable any Mobile Devices
- Hosting Services

Client Responsibility

- Third Party Login & Integration credentials provided by the client
- Images and Content provided by client
- Domains provided by client
- if any new feature, customization and changes required that also affected our pricing & package and timeline

Consulting

We will consult you on best practices, advise you on strategy, and guide you through implementation throughout the entire process. We are here to ensure your success. Please feel free to ask us any questions you may have via email anytime. You have unlimited email support throughout the duration of the project lifecycle and support phase.

Quality Assurance Testing

Quality Assurance (QA) is essential before launching anything new. Our QA team will find any issues that the app has. We will test cross-platform to ensure that your app looks, feels, and works the way it is intended to.

Pricing & Package

- Price : 20000 INR per month including Hosting and support + 18% GST
- Milestones & Payment Terms : 12 Months payment upfront
- Total Price : 240000 INR for a year + 18% GST

Thank You

DolaTech Empire

info@dempire.in

M: +91 7574010909