Version Details

CRM Version	**CRM Professional Module**
Licenses provided	15 user Licenses
Cost in Indian Rupees	(One Time Cost)Please call for prices
Scope for Upgrading	Data migration to Enterprise & Cloud versions possible

Features available in Professional Version

Administration	**1. User wise (Object Level) security** 1.1. For Menu Access 1.2. Buyer/Products & Supplier Access 1.3. Show/Hide Costing 1.4. Allow Sending Offers / RFQ's 1.5. Password change 1.6. Transaction level access **2. Password Management** 3. Global Settings (Time/GST/Currency) 3.1. Configure all types of GST Values from a single location 4. Automatic Reminder Generation
System Configuration	**1. Customer Development** 1.1. Customer **Industry Classification** 1.2. Customer **Product Classification** 1.3. One-time Customer Birthday/Anniversary creation 1.3.1.Birthday emails trigger automatically on that day 1.4. Content Broadcast Management 1.5. **Remote Phone Call Service** (3rd Party Integration present) 1.6. Product wise discount management 1.7. Customer Agent Classification 1.8. Assign Marketing Personnel/Team to handle each customer 1.9. Track Customer on a **BING MAP** on a click 1.10. Direct Option to Generate Enquiry on the spot 1.11. Transfer Customer as an Outlook Contact on a click 1.12. Track Customer Do's & Don'ts to respect his practise **2. Supplier Development**

	3. Product Development 3.1. Capture & Attach Picture of each Product 3.2. Product Classification per product 3.3. Brand & Batch Classification per product 3.4. Create COA request & have them automatically Linked to each product by the QA/QC COA generation team 3.5. Assign Marketing Personnel/Team to handle each Product 3.6. Hard code Price provided by each Supplier for each product, later this info is used by Sourcing & Procurement team **4. Employee Development** 4.1. Classify each Employee/Marketing person under a Company/Department/Division & Position 4.2. Capture & Attach Picture of each Employee 4.3. One click to check All Customers/Suppliers & Products handled by that individual **5. Agent Development** 5.1. Assign Agent to each Customer who represent your services 6. **Classify Industries** (Can be used for Customers/Products/Suppliers) 7. **Classify Products** (Can be used for Customers/Products/Suppliers) **8. Multimedia Content Configurations** **9. Global Settings** 9.1. Configure Countries, Cities, Currency & GST per entity **10. Company Development**
Business Development	**1. Lead Management** 1.1. Get to know **the STATUS of Each LEAD** from the time its assigned to your Marketing Person for follow-up until the Order is either Won OR Lost. **(All from a Single Dashboard)** 1.2. Import Leads from Excel into the CRM 1.3. Create & perform follow-ups on Existing & Non-Existing Product requests 1.4. Create reminders to follow-up leads 1.5. Send Multi-media content to each Lead during follow-up stage **2. Quick Enquiry Form** 2.1. Quickly capture a Customer Enquiry 2.2. One Click Request for Cost from Purchase/Sourcing department 2.3. One Click Request for Sample from Sample Distribution department **3. Follow-up Customer Enquiries** 3.1. When security is activated each Marketing personnel 3.2. One Click Offer/Quotation generation on different Pre-fixed Company Letter Heads 3.3. Automatic Customer GST specification retrieval 3.4. One Click to check Customers Buying History

	3.5. One Click to broadcast content to Customer 3.6. One Click for Document Request from Regulatory Affairs Dept 3.7. One Click to perform Customer Profiling 3.8. One Click to check previous Vendors for a requested customer product (Option provided if KELP SRM Module is not purchased) 3.9. All Pricing Retrieval and Broadcasting is completely secured 3.10. Perform Follow-ups per enquiry tracked using automated reminders 3.11. Customize your own Header/Footer text which appear on outgoing Quotations 3.12. One Click to send Offer/Quotation as an attachment 3.13. Option to send Offer/Quotation to select people at Customers end 3.14. Management can submit their remarks to the Marketing by email, guiding them on handling the enquiry 3.15. All events happening in the Enquiry form automatically update the Main Enquiry Dashboard for management to view everyone's progress
Data Explorer	1. Customer Enquiry Explorer 2. Marketing Executive Performance Explorer 2.1. Excel like data filters provided to narrow your search for information and have it presented in a Print Preview 3. Buyer Explorer 4. Seller Explorer 5. Product Explorer 6. Reminder Explorer 7. Seller RFQ Explorer 8. Geographic Explorer (For GST Compliance Setup) 9. Security Explorer
Detailed Reports	**Reports which can be Previewed, Printed and Emailed as attachments** 1. Business Development by Date 2. Business Development by Buyer 3. Business Development by Seller 4. Business Development by Product 5. Business Development by Marketing

MIS Reports integrated via MS-Excel (To be purchased separately)

Chart # 1	Who Purchased What When and How Much
Chart # 2	Enquiries by Marketing Executives
Chart # 3	Summary of Total Enquiries (Pending/WIP/Completed)
Chart # 4	Product Wise Marketing
Chart # 5	Sample Distribution Analysis

Integrated with the below modules via Workflow (To be purchased separately)

SRM Supplier Relations	1. Request & Process Cost from Sourcing & Procurement Team
SDM Sample Distribution	2. Request & Process Samples from Sample Department
COA Certificate of Analysis	3. Request & Send COA from QA/QC Lab to Customer via Quote

Technology Details

Windows O/System	Windows 7 & Win 10 Recommended
MAC O/System	Can run using Windows Parallel or Boot Camped on a MACBOOK
Front-End / Back-End	Microsoft Access Version 2010 and above
MS-Office Integration	Tightly Integrated with MS-Outlook Version 2010 and above
Software Customization options	Software Engineers from Aqantas will only customize the Customer Offer which you will be sending across to your Customers. For advanced customization we would advice you to buy the CRM Professional Version where the customization will be based upon the New business features or processes which you plan to introduce into the software. The customization will be implemented using the **MSF (Microsoft Solutions Framework)** Process Model methodology

Support Details

FREE DEMO	• Free Demo at your office within Mumbai City Limits • During Lockdowns demo's will be On SKYPE/ANYDESK/Connectwise • For New Zealand customer demo between NZT 1pm to 6pm • For Other countries please confirm demo timings via info@aqantassoftware.net as per IST
After Sales Support	• Online support either on Skype, Team Viewer or Any Desk • For serious issues or new requirements our personnel will visit your office in person

AMC Details

Firefighting AMC	• Call for details
Development AMC	• Calll for details
ADHOC AMC	• We are also offering you an ADHOC method of payment whenever there is a requirement to modify the software as per your changing business process. This helps you pay for only what's required as you go

Contact Details

Contacts

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