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**Zoho CRM Features and its Benefits**

<b>Sales Force Automation</b>	<b>Description</b>	<b>Benefits</b>
Leads	Consolidated and centralised repository of all customers' details and contact history. Effectively manage sales activities through Calendars and alerts	Better organise of leads/potential to ensures that they do not fall through the cracks or annoyed by multiple contacts. Foster stronger Customer relationship with more accurate insight of the cusotmer. Match the right leads to the right sales personal. Effectively management of sales activities to make sure no appointment will be missed.
Contacts		
Accounts		
Opportunities / Potentials		
Tasks, Calendar, Call Log, and Notes		
Sales Forecasting		
<b>Team Collaboration through Feeds</b>		
Team Collaboration with Direct messaging	Direct messaging allows users to interact directly for more effective communication and share information effectively within a Team/Group	Reduce lengthy meetings with effective team collaboration. More accurate and faster sharing of client information between team members.
Sharing of files and documents		
Group users into teams for collaboration		
<b>Marketing Automation</b>		
EDM, Mass email to Contacts	Filter and group your database for targeted marketing through campaigns. Mass email or EDM to your database. Mail merge for personalised email or mailer. One single place to manage Facebook/Twitter interaction.	Increase ROI of marketing efforts with more effective and targetted marketing. Better measurement of your marketing efforts. Bring the company closer to your customer.
Creation of Marketing Campaigns and track the campaign		
Creation of email templates		
Mail Merge for personalise email		
Integration with Facebook		
Integration with Twitter		
Convert Facebook/Twitter contacts to Leads/Contacts		
<b>Custom Support</b>		
Case management	Assigning of cases to users. Track status of these cases. Knowledge base of solutions after cases were resolved.	Increase the level of customer support with access to best practises and solutions of the different senarios experience by the company. Tracking of the cases will make sure that all cases are resolve and no case left unattended.
Capture of solutions to the cases		

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<b>Basic Inventory Management</b>		
Products	Consolidated records of Products or Services provided by the company. Creation of customised quotation/invoice template with Company letterhead. Management of Product List and Price List.	Streamline and automate routines such as pricing, order processing, quotation creation and other administrative tasks, so that more time will be spend working with potential customers
Price books		
Sales quotes		
Sales orders		
Invoices		
Purchase orders		
Creation of Quotation, Sales Order, Invoice and Purchase Order Template		
Printing of these templates		
<b>Documents Management</b>		
Folder sharing	Upload and attaching of files/documents an link them to customers and potential. Sharing of files between users.	Consolidate place to stored related documents needed to close a deal. Better organise documents with versioning.
Attach documents		
File versioning		
<b>Analytics</b>		
Standard Reports	Customised and create your own management reports to suit your business. Setting of Dashboard reports for real time monitoring. Interactive reports with charts.	Reduce the time needed to generate reports. Allow real time monitoring of business. Better forecast of sales for planning ahead.
Custom Reports		
Schedule Reports		
Dashboards (with Charts)		
<b>Integration</b>		
Website Form (e.g. Contact Us) to Leads	Link up with external application such as Company's website, Accounting system, Email system, etc...	Streamline and automate business processes so that more time will be spend working with potential customers. Data transfer across different systems are more accurate without duplication of effort.
Website Form to Contacts		
Website Form to Case		
Microsoft Outlook plugin		
Synchronize Google Calendar and Google Contact		
Link up with Gmail		
API for third party solution integration		
<b>Security Administration</b>		
Profiles Management	Access control of users, different users will have access to different modules. Data can be privatized i.e. sales person A will not be able to see sales person B's clients.	Better control of data security
Organizational hierarchy (Roles) Management		
Field-level security		
Groups access		
<b>Workflow Management</b>		
Workflow rules and event triggers	Auto trigger and notification to users. E.g. Send email or alert users when a contact is in the system for 3 years. Ability to customised and create own trigger.	alerts and notification allows you to be always proactive and make sure they will not miss out on any potential.
Workflow alerts such as email notification		
Workflow tasks or events		
Auto Assignment rules		

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<b>Data Administration</b>		
Import of CSV files	Ease of uploading CSV or Excel files to the system	Reduce time taken for data entry. Cut out the human errors with data upload.
Export to Excel or CSV files		
Data Backup by Zoho		
<b>Product Customization</b>		
Page Layout	Create new fields pertaining to your business needs	Provide the flexibility and ease to add new fields
Rename Tabs		
Custom Fields		
<b>Mobility</b>		
Free mobile Apps for iOS devices	Ability to access to Zoho CRM through mobile apps. Access to CRM on the move.	Access to customer information on the move, 24/7.
Free mobile Apps for Android devices		