

CUSTOMER RELATIONSHIP MANAGEMENT

CRM software that helps you sell smarter, better, faster.



- ✓ NiftyCRM helps you Manage Sales Cycle with higher conversion
- ✓ Manage all leads in once place
- ✓ Build professional, great looking quotes
- ✓ Powerful support ticket system that increases Customer Retention Rate
- ✓ Task based billing tracking for employee

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 **DAS**
Infomedia
An ISO 9001 : 2008 Company

LEADS MODULE



- Add leads easily with Intuitive UI
- Keep track of leads in One place
- Close leads faster using notes and tasks

PROJECT MODULE



- Manage All projects from Single Screen
- Create Project for any Client
- Create Task list for each project

TASK MODULE



- Create and assign the task
- Task management
- Add task directly or associate with module item

TICKET – CASE MODULE



- Case-Complain management with notes
- Add a case for any client issue
- Assign case to the team for resolution

ACCOUNTS MODULE



- Convert a lead to Client-Accounts
- Manage Accounts with notes and tasks
- Manage multiple contacts for the same account

CONTACT MODULE



- Create Contact view Design
- Organized view to save time
- Manage contact with task and notes

KNOWLEDGE BASE



- Add knowledge base articles from a text editor
- Help Client effortlessly
- Track if your article is useful to clients, improve text based on votes

QUOTE MODULE



- Manage quote listing
- Add custom quote for a specific client
- Reuse historical quote

INVOICE MODULE



- Build Client winning Quotes and Invoices
- Print invoice in PDF or on Screen
- Setup Subscription based recurring Invoices

TAX MODULE



- Tax list management
- Add tax to % amount
- Select tax value directly from the quote

NEWSLETTER MODULE



- MailChimp integration
- Import leads and contacts directly in MailChimp
- Easy to configure

USER MODULE



- Customized User roles with Access Rights
- User management
- User can edit and view their details

SALES MODULE



- Generate sales order directly or from the quote
- Associate sales order with Project
- Manage Multiple Contact for Same Account