

CSoft Business Software

CRM Module

Overview

Available in CSoft Business Startup, Business Accelerator and Business Advanced. This module enables you to keep track of contacts with existing and prospective clients. We can generate a data file for mail merge or labels on this file as required. This also has full search facilities available.

Contacts / Prospects (CRM)

The CRM includes Current Contacts and Prospective clients. The prospecting system is a database of prospective clients and/or details of other contacts who are not clients.

We provide an overview form from where we can view all Contacts, look at customers details, view there history details, look at sales.

There is a notes page where relevant comments can be recorded. A diary and reminder system as well to keep appointments organised.

Sales and account details for an individual can be checked at a glance.

Full search facilities are also available.

Features

- ✓ Enter contact details
- ✓ Enter contact telephone
- ✓ Enter contact email and mobile phone
- ✓ Record personal details
- ✓ Group Contacts
- ✓ Schedule next appointment date
- ✓ Enter contact intervals
- ✓ Enter next contact date
- ✓ Enter last contact date
- ✓ Enter contact info
- ✓ List Daily Details
- ✓ Review all customer details from one screen
- ✓ Review and make customer notes