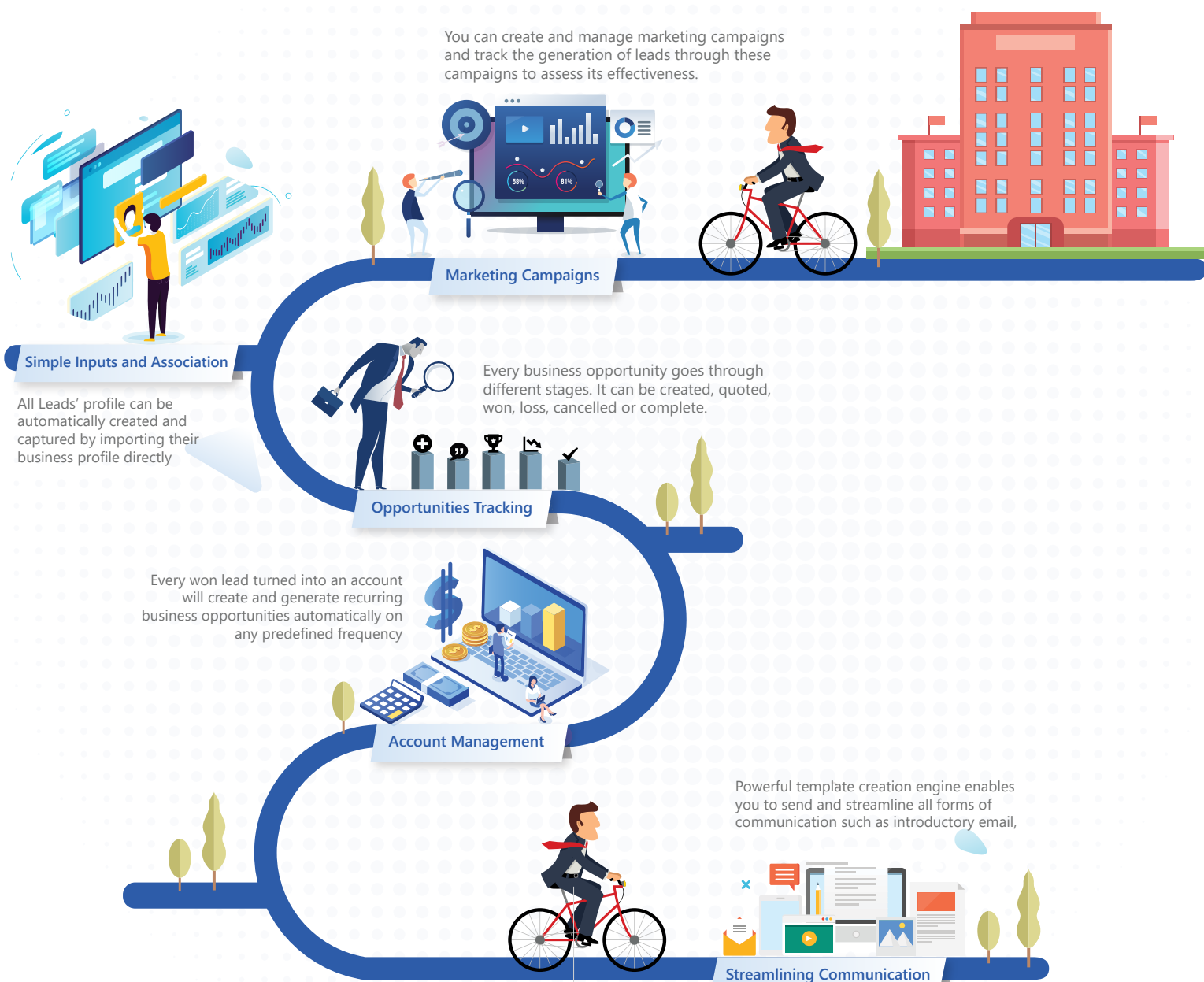


Customer Relationship Management (CRM)  
Application that put serving your customers as its sole focus. It strives to create a fully personalised approach to forge extraordinary relationship with every customer.



## Marketing Campaigns

You can create and manage marketing campaigns and track the generation of leads through these campaigns to assess its effectiveness.

Campaigns / Facebook Ad

Code: Facebook Ad Name: Facebook Ad

Description: Facebook marketing

Type: Advertisement Status: Active

Remarks:

CAMPAIGN DETAILS

Item Name	Budgeted Cost
Tot	Total

## Simple Inputs and Association

All Leads' profile can be automatically created and captured by importing their business profile directly

Leads / Quick lead / Lead

Lead: Contacts Associations Activity Opportunities Questions Communication

Name: Quick lead Source Type: Lead

Type: Lead Option Identification Type: Lead Option

Industry: Select Option Incorporation Date:

Company: Select Option Exchange (Lead Link is Primary Address):

Reminders:

ACM	IC
<input type="checkbox"/>	<input type="checkbox"/>

## Opportunities Tracking

Every business opportunity goes through different stages. It can be created, quoted, won, loss, cancelled or complete.

Opportunities

Opportunity ID	Name	Set Name	Status
OPP-2019-00504	Customize Pte Ltd	Audit (ALP) - Regular	01/09/2019
OPP-2019-00505	Artemis Software Pte Ltd	GST Registration	
OPP-2019-00506	Deva Education Pte Ltd	Bookkeeping (Quarterly)	15/06/2019
OPP-2019-00507	Customize Pte Ltd	Corporate ECI	01/01/2019
OPP-2019-00508	Amerson Sage Pte Ltd	MAS Reporting - Annually	
OPP-2019-00509	AT RAFFLES SERVICES PTE LTD	Bookkeeping (Monthly)	01/09/2019

## Account Management

All Leads' profile can be automatically created and captured by importing their business profile directly

Accounts / AT RAFFLES SERVICES PTE LTD / Account

Account: Contacts Associations Activity Opportunities Questions Communication

Name: AT RAFFLES SERVICES PTE LTD Source Type: Customer

Type: Lead - Company Incorporation Type: USA

Industry: Information and Communications Incorporation Date: 17/08/2019

Company: Select Option Exchange (Lead Link is Primary Address):

Reminders:

ACM	IC
<input type="checkbox"/>	<input type="checkbox"/>


## Streamlining Communication

All Leads' profile can be automatically created and captured by importing their business profile directly

COMMUNICATION

Name	Code	Type	Date & Time
Quotation Email	QE	Quotation Email	24/08/2019 03
Quotation Email	QE	Quotation Email	24/08/2019 03
Introduction email	Introduction email	Email	24/08/2019 03
Reminder Email - Final Tax	Reminder - Final Tax	Reminder Email	20/08/2019 00
Quotation Email	QE	Quotation Email	18/08/2019 08
Introduction email	Introduction email	Email	18/08/2019 08
Quotation Email	QE	Quotation Email	18/08/2019 08
Quotation Email	QE	Quotation Email	18/08/2019 08
Quotation Email	QE	Quotation Email	18/08/2019 12
Quotation Email	QE	Quotation Email	18/08/2019 12

 **Client Cursor**  
Integrates with:

 **Workflow Cursor**

 **Doc Cursor**

 **Teams**

 **SharePoint**

 **Office 365**

 **DocuSign**