



CRM application to manage all your clients interaction in real-time, for a fully personalized engagement

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



Marketing Campaigns

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



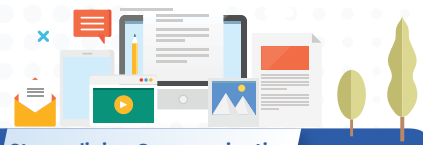
Opportunities Tracking

Every won lead turned into an account will create and generate recurring business opportunities automatically on any predefined frequency

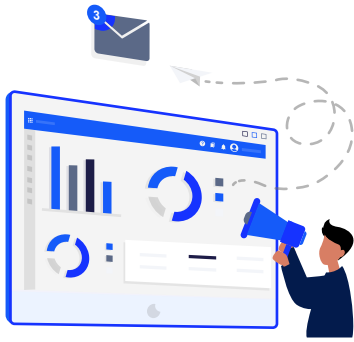


Account Management

Powerful template creation engine enables you to send and streamline all forms of communication such as introductory email,



Streamlining Communication

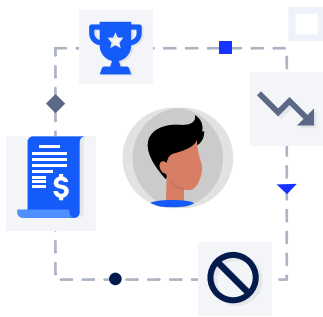
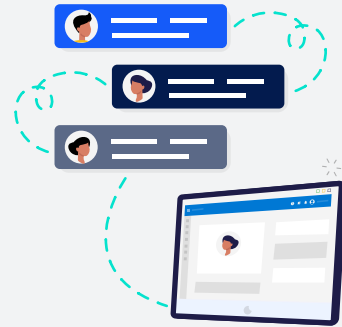


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Simple Inputs and Association

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

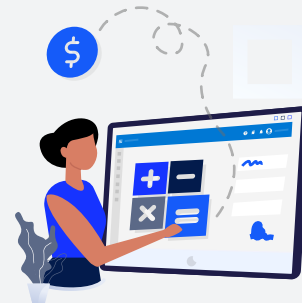


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Streamlining Communication

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 **CRM**
Integrates with:

 **Workflow**

 **Doc**

 **Teams**

 **SharePoint**

 **Microsoft 365**

 **DocuSign**