| | |
|---|---|
| **360 degree integration** | Main Challenge for any business is to coordinate communication that is being done with Customers. (Generally one person does not know what other person is talking to customer) |
| | All the emails, SMS, Calls and Meetings done by any team member with any customer are visible in Central Location - Easy to track analysis. |
| | Automation features that enable Email/SMS/Call to Lead/Case instantly. |
| | Telephony Integration enables click to call, call logging and call popup. |
| **Enjay Latitude Mobile app** | Get all the information from your CRM on your Mobile. |
| | Enter new records instantly. Make a Call/SMS/Email instantly with single click. |
| | All calls, SMS, Email that you do from Mobile Can be logged. |
| | Time and Geographical Tracking to enable Time and Cost analysis. |
| **Enjay Longitude Mobile app** | Creating a self service portal is a old concept. |
| | Enable your Customers to create/track Support Tickets right from their mobile. |
| | Customers can request Auto Call back (requires Asterisk based Enjay Synapse Solution) |
| | You can send Notifications to all Customers, instantly. |
| **Unlimited Custom fields and Modules** | Unlimited Custom fields (No coding required) |
| | Edit values of drop-down on your own (No coding required). |
| | Custom modules to handle your customised business processes. |
| | Even layout of record view, list view and dashboard view can be modified to suite your requirement and preference. |
| | Custom fields and custom modules are available in Dashboards and reporting also. |
| **Unlimited Dashboards and reporting** | Get vital information as and when needed, in real time. |
| | Unlimited Customisable Dashboards to keep you updated about the activities in organisation. (List view and charts) |
| | Create Customisable reports based on any module any field. (even custom fields can be used to create reports) |
| | Create Scheduled reports, which will be emailed to you automatically. |
| | Reports can be exported in PDF, MS Excel format. |
| **Workflows, approvals& Automations** | Create custom workflows to automate your routine business tasks - e.g.: sending notification and alerts to customers or team members. |
| | Custom approvals and business flows to make sure that process is followed correctly. |
| | Time based or field value based escalation automated with workflows. |
| | Send automated Emails/SMS using workflows. |
| **Roles & Groups for Access Control** | Your data is safe and secured. Cannot be exported or copied without your permission |
| | Dual Authentication and IP based access restrictions. |
| | Role based and Group based access control. |
| | As an administration you can manage who sees what? |
| | Set fine grained security based on Module level, Record Level and even Field Level. |
| | Can give Read Write, Read Only or even No access right. |
| **Time & Cost Analysis** | Every case, every opportunity, every account and every employee is a cost to company. This can be tracked and managed easily. |
| | With the help of Mobile app (Enjay Latitude), its very easy to log time spent on each Task, Opportunity, Case or Meetings. |
| | Easy to understand analytical dashboards and reports provide insightful time and cost analysis. |
| | Geographical tracking of employees is an additional benefit. |
| **API for third party Software integration** | Integrate your ERP software, website, Portal, Mobile App or any software platform with API easily, efficiently and also very securely. |
| | SOAP/Rest based API helps to integrate with any software, any platform. |
| | Can integrate with Desktop application or web application. |
| | Either we integrate your app (if your app has API) or we help your App developer with CRM API. |
| **Deployment Flexibility** | Cloud based (Private or Public) or on premise options available. Can be implemented in Virtualised Environment as well (VM). |
| | Various plans for implementation as per your business requirements. |
| | Data Migration, Training, configuration, Customisation. |
| | Business Process Consultancy. |
| | Enjay Luster Care - Suggestive Maintenance Plan with frequent Process Quality Management Audits and Sales Discovery Sessions. |

# Detailed Feature list

| | | Alpha | Delta | Omega |
|---|---|---|---|---|
| **Marketing Features** | | | | |
| Leads Capture (Direct Mails/Manual/ Trade-shows) | Capture All leads from everywhere, can also specify lead source, campaign so that you can track and anlyse your marketing efforts. | Y | Y | Y |
| Lead Assignment and Automated followups | Automatically assign leads to users based on the criteria that you define. (eg: based on city, product, or type of enquiry etc). | Y | Y | Y |
| Capture Leads from Website | If somebody fills up a form on your website, a lead is automatically created in CRM instantly. | | Y | Y |
| Capture Leads from Portals (Yellow Pages) | You have signed up on portals like Justdial, Indiamart, Commonfloor, Magicbricks, TradeIndia etc, If someone makes an enquiry on that portal a Lead is automaticaly created in CRM instantly. | | | Y |
| Inbound Email to Lead | Emails received to sales@yourcompany.com can go in CRM as leads, automatically and be assigned to a user. | Y | Y | Y |
| Inbound SMS to Lead | All SMS received at a particular Number or ID can go in CRM as leads and be assigned to a particular user | | Y | Y |
| Marketing ROI Analysis | Say you spent "A" amount to create "B" leads from which "C" amount of Opportunities are created out of which "D" get closed. So whats your Marketing ROI - Get analytical Graphical reports | | Y | Y |
| **Sales Features** | | | | |
| Leads/Funnel Management, Track Deals | Manage and track progress and activities on your Leads & Deals. | Y | Y | Y |
| Product Masters | Product Masters helps you classify your leads/deals and manage them accordingly. | Y | Y | Y |
| Product Management | Send Quotes from CRM. Also track various stages of Quotations (draft, quote sent, Negotiation stage, won, lost). Tracking of Quotes revisions. | | Y | Y |
| Advance Quotations | Product Management enables tracking of products quoted for, won and lost. | | Y | Y |
| Sales Forecast | Get detailed analytical forecast of Sales in coming months, weeks - product wise, user (salesperson) wise, region wise. | | Y | Y |
| Lead/Opportunity Aging analysis | Ageing analysis of Leads/deals help you identify leads before they go stale. It Also helps you track the total duration it takes to close a particular deal, which can help you to finetune your sales process. | | Y | Y |
| **Service Features** | | | | |
| Support Cases / Service / Ticket Management | Create/Manage and track support tickets in CRM. Auto-assign to users based on product selected or city or any other criteria. | Y | Y | Y |
| Product Masters | Product Masters helps you classify your cases according to Product categories. | Y | Y | Y |
| Monitor Turn around Time (TAT) | Monitor your TAT (Turn around time) which your team takes to respond and resolve the tickets. | Y | Y | Y |
| Product Management | Product management helps you to manage inventory/Asset of your customers AMC, it will include details like Warranty period, AMC period etc. | | Y | Y |
| AMC Contracts Management | AMC/Contract Management helps you to manage AMC, get renewal reminders. Get AMC details while entering Support Case. | | Y | Y |
| RMA (Replacement Material Authorisation) | RMA (Replacement Material Authorisation) manages entire Replacement process. Track pending RMA. Links with Support Cases/Tickets. | | Y | Y |
| Inbound Email / SMS to Ticket | Automatically create Ticket from inbound Email/SMS directly. Auto assignment also possible | | Y | Y |
| Smart Feedback Integration | Send Smart-Feedback Email to customer when case closes. They can respond with single click directly from their email. All feedbacks are recorded in CRM. | | Y | Y |
| SLA Management / Implementation | Manage/implement Service Level Agreement. Auto-Escalation, reminders based on rules created. (ISO standard specifications). | | | Y |
| Bug management (Root Cause Analysis) | Bug management to facilitate Root-Cause analysis of all the incidents recorded in CRM. Helps you to improve your product/services. | | | Y |
| **Companies & Persons** | | | | |
| Centralised Contact Management. | Manage complete details of all your Customers/Clients companies/people etc. | Y | Y | Y |
| Unlimited Classification | Unlimited Classification and categorisation possible which helps you in targeting your customers for Up selling and cross selling. | Y | Y | Y |
| Sales Discovery reports. | Get analytical reports for discovering your potential clients for upselling and cross selling. | Y | Y | Y |

# Detailed Feature list

| Activities & Task Management | | | | |
|---|---|---|---|---|
| Tasks | Captures your tasks (inhouse and out of office) and visits and relates to deals / companies. | Y | Y | Y |
| Calender | | Y | Y | Y |
| Appointment Managment | Create and manage your calendar, meetings and reminders. | Y | Y | Y |
| Meeting Management | | Y | Y | Y |
| Reminders | | Y | Y | Y |
| Notes & Documentations | Attach (any type of ) documents as Notes to any records in CRM. Can also do that from your mobile (eg: you had discussion with client and created notes on a piece of paper, Just click a photograph on your mobile and attach it to CRM using Mobile App). | Y | Y | Y |
| Workflows & Approvals | Create detailed automation and workflows for alerts, notifications and approvals. eg: Quotation above certain amount requires approval from a senior person. | | Y | Y |
| Document Management | Create and store documents that you frequently use in your business. eg: your NDA, SLA, Catalogues, Policy documents or even HR documents. | | Y | Y |
| Email / SMS Features | | | | |
| Unlimited Email Templates | Ability to create unlimited Email Templates to save time and conserve uniformity in communication. . | Y | Y | Y |
| Outgoing Emails from CRM | Send email to anybody in CRM with a single click. | Y | Y | Y |
| Inbound/Outbound Email Sync | Get all your inbound/outbound Google Email synced in CRM, even if you have not sent it from CRM directly. So send your Google Email from Mobile, webmail or outlook - dont worry, it will appear in CRM properly synced and related to relevant contacts and accounts. | Y | Y | Y |
| Email/SMS Automation | Send automated Email / SMS to your customers or team members based on some activity/time lapse. | | Y | Y |
| Unlimited SMS Templates | Create Unlimited Templates for SMS so that every time you want to send SMS, its just a click away. Send group SMS to selected contacts/leads. | | Y | Y |
| Administrative Features | | | | |
| Data Export | All the Data in CRM can be exported by Admin any time in Excel/CSV format, its instant and free. | Y | Y | Y |
| Audit Logs | Create Audit Logs on Important Fields so that you know who changed what and when. | Y | Y | Y |
| Roles & Access Control | Decide who can see what and how much by creating Data Access Control lists based on groups & Roles. Control Module level, Record level or even field level access control (Read Write or Read Only or No Access). You can also create Private Contacts or Private Leads, which is visible only to people whom you select.. | Y | Y | Y |
| Custom Fields | Custom fields to accommodate any special data you want to collect according to your business requirement. Custom fields are also available for reporting. | | Y | Y |
| Custom Modules | Custom Modules can be created to accommodate your business process. | | Y | Y |
| Dashboard & Reporting Features | | | | |
| Dashboards | Dashboards (or Cockpits as we call them) show multiple Dashlets (Dials) you vital statistics about your Business in real-time. Infact your KRA/KPI can be mapped with your Cockpit. | Y | Y | Y |
| Ready to use Reports | Get predefined reports that give you indepth and intelligent insight into your business. Reports can be data based or even Graphicals with meaningful charts. | 10 | 25 | 50 |
| Unlimited Customised Reports ** | Create unlimited number of reports as per your business requirements. | | Y | Y |
| Scheduled reports | Schedule reports for your team members and managers so that they receive their reports on Email @ a scheduled time. | | Y | Y |
| Colour coded reports | See your leads, deals, contacts, cases in Colour coded reports and views for instant insights and action eg: overdue cases are shown in RED, closed deals shown in Green and so on. | Y | Y | Y |
| Score Card Views | View large sized meaningful scorecards for leads, cases & deals based on stages of those records. | | Y | Y |
| Time & Cost Analysis Reports | For every case, opportunity, Lead, Account get time and cost analysis of efforts done by your team. Helps you to understand ROE (Return on Efforts). | Y | Y | Y |

| Special Features | | | | |
|---|---|---|---|---|
| User Activity Monitoring | User Activity Reports: Get analytical report of what your users are using, creating and editing in CRM. This report is emailed daily to admins.. | Y | Y | Y |
| Data Deduplication tools | Prevent and alert your users from creating duplicate data. You can also use Analytical Deduplication tool to cleanse your imported data which contains duplicate. Once you find duplicate data, it allows you to merge the duplicate records. | Y | Y | Y |
| Enjay Latitude Mobile App | Some special features in Mobile App: ability to log all the SMS/Calls to CRM instantly even if CRM app is not active. Also it allows single click of adding tasks/visits - by Check-In and Check-Out button. | Y | Y | Y |
| Linkedin Lead Integration | Use LinkedIn to find your prospects (People and Companies) and then add them to CRM instantly with a single click. Handle duplicates and merge them instantly and inteligently. This is a Google Chrome Extension. . | | Y | Y |
| Shadow Login (Sudo User) | Login as your subordinate user to help create some reports or set some views - no problem. Shadow Login feature to login as some other user and operate system (Admins only). | | Y | Y |
| Inbound/Outbound SMS Integration | Send individual / bulk / Automated SMS. Even receive inbound SMS directly into your CRM. SMS gateway. Required. Use any SMS service provider in the world and our Solution supports that. We also have support for GSM based gateways | | Y | Y |
| Telephony Integration | Telephony integration with IPPBX (you can either use our Enjay Synapse or other supported Solutions On premise or Cloud IPPBX system). Get Call popup with complete details, Click to call, Call Logging, call recording link etc. | | | Y |
| Predictive Dialing | Predictive Dialling: Let the system dial out to your customers automatically one by one and land the calls to your agents, they get call disposition options with Script popup (what to speak). | | | Y |
| Two Factor Authentication | SMS based two factor authentication helps to make CRM more Secured. User logins using username/password credentials gets an OTP over SMS and can only proceed after entering that OTP. | | | Y |
| API Integration | CRM can be integrated with any other website or stand alone application or ERP or anything in the world using API. | | | Y |
| Restrict Access based on IP | Restrict IP from where your users can access the CRM system. That gives additional security even when you are using Cloud based CRM. Users can login only from allowed IP. Eg: CRM can be accessed from your HO and Branch offices only. | | | Y |
| Extra Features / Add-ons | | | | |
| Knowledge Base | Create knowledge base for your internal Teams as well your customers. Ability to create KB Article directly from Bugs.<br>Examples of KB can be your HR policies, Customer Support Articles, Sales Policies. | | | |
| Multiple Businesses | If you Single Corporate Entity, but different lines of Business, All users can use Same CRM. Helps you get a consolidated reporting as well as reuse Shared Information | | | |
| Mobile App for Customers | Help your customers help themselves by Createng/Tracking Tickets and Enquiries.<br>Also supports Auto-Call back facility, (integrates with Asterisk based Enjay Synapse) | | | |
| Basic Leave Management | Users can apply for Leave and their seniors can approve / disapprove Leave with single Click. Support Email Notification and also reporting. | | | |
| Tally CRM-Integration | **Sync Accounts** : Send Customer Details from CRM to Tally with a Single Click. A new ledger is created in Tally with all the details from CRM<br>**Sync Outstanding** : Get Customer Outstanding from Tally ERP directly into CRM<br>**Sync Quotes** : Create Quotations in CRM and send to Tally as Sales Invoice (or Sales Order) with a single click.<br>**Projected Cashflow** : Get projected short-term cash-flow reports from CRM, based on inputs entered by Sales Person. | | | |
| Freshdesk Integration | **Sync Tickets** : Your customers create tickets on Freshdesk Portal and they get synced instantly in CRM.<br>**Sync Activity** : If you or your Customer replies to that Ticket, that is also synced in CRM.<br>**Savings** : You need to buy only 1 Freshdesk Account. All the Ticket management is done from within CRM.<br>**Social Support** : Freshdesk supports Ticket Creation using Social Media. Twitter & Email integration for Ticket Creation. | | | |
| Enjay Longitude Mobile App | Creating a self service portal is a old concept.<br>Enable your Customers to create/track Support Tickets right from their mobile.<br>Customers can request Auto Call back (requires Asterisk based Enjay Synapse Solution)<br>You can send Notifications to all Customers, instantly. | | | |

| | |
|---|---|
| Project Management | Standard project management features like defining the checklist of tasks to be done for a project type and measuring activity/efforts done on those project is possible. Also what tasks are done and what are pending is also possible. Material handling not included, but time and cost analysis available. |