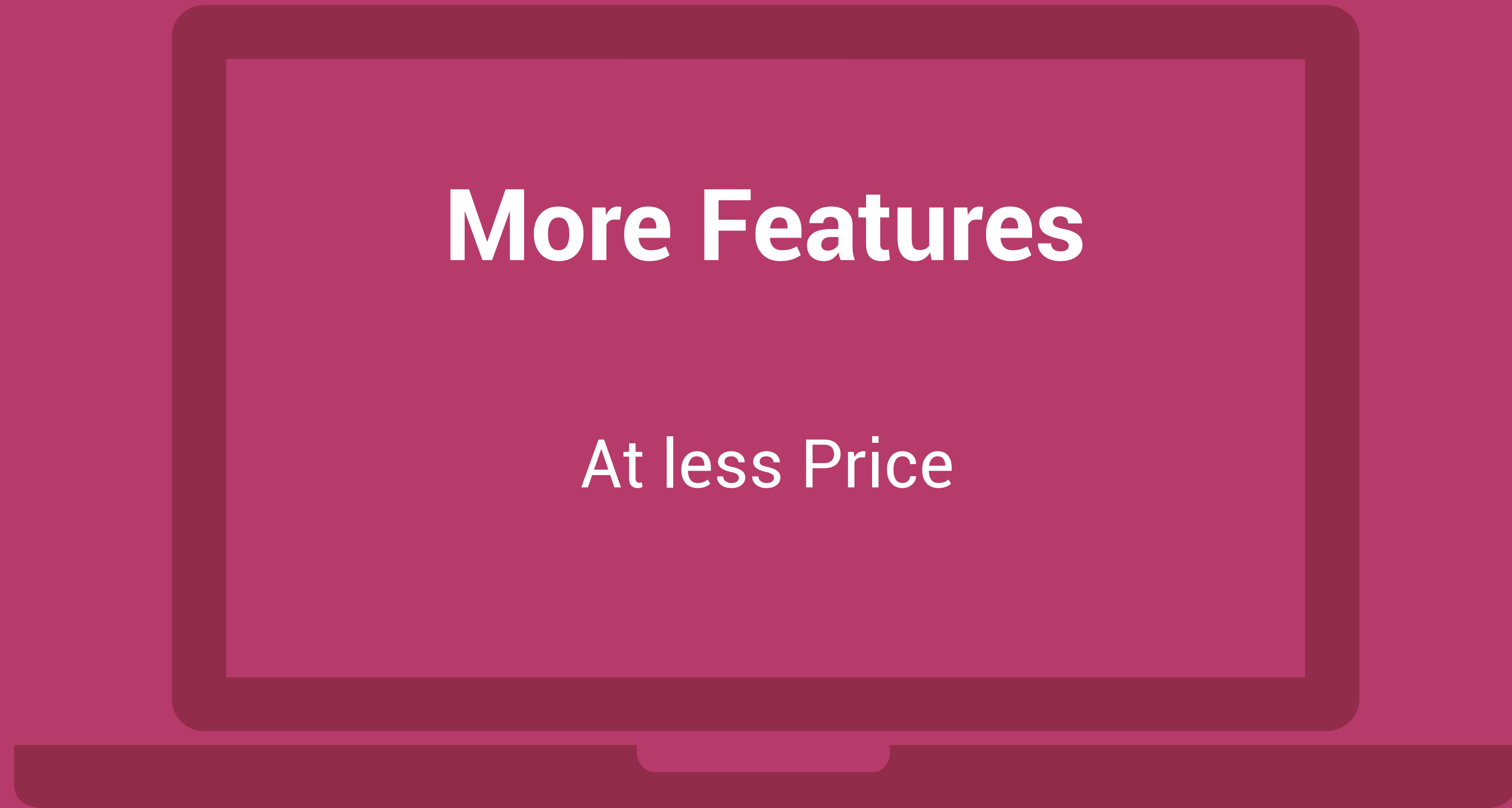


**Sales CRM**

**Service CRM**

**Marketing CRM**

**Enjay  
CRM**



## **How to use this Presentation**

First we discuss all the features of complete solutions. Then explore various implementation Plans and options

# More Features

At less Price

**1**

360 degree  
integration

**2**

Mobile Apps,  
Power in your  
Hands

**3**

Unlimited Custom  
fields and  
Modules

**4**

Unlimited  
Dashboards and  
reporting

**5**

Email/SMS/  
Telephony  
Automation

**6**

Roles & Groups  
for Access  
Control

**7**

Time & Cost  
Analysis

**8**

API for third party  
Software  
integration

**9**

Deployment  
Flexibility



# 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.

**2**

Mobile Apps,  
Power in your  
Hands

## Mobile Apps (One for your Team and one for your Customers)

### Enjoy Latitude

- 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.

### Enjoy Longitude

- 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 Enjoy Synapse Solution)
- You can send Notifications to all Customers, instantly.



# Custom fields & 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.

# Dashboard & Reports

- 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

- 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.



# Data 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 (Enjoy 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 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.
- Enjoy Clustre Care - Suggestive Maintenance Plan with frequent Process Quality Management Audits and Sales Discovery Sessions.

# More Features

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# CRM Implementation Plans

## As per your business requirements



**Marketing**

**Sales**

**Service**

## Find more customers



Generate and capture more leads directly into CRM in real time from all the sources. Integration with Website, Email, SMS, Mobile App, Yellow Pages. Telephony integration for lead generation. Get Marketing ROI Analysis.

## Close more customers



Close more sales with lead management including Deals and Quotations. Nurture your leads with Email/SMS Automation. Sales Forecasting & Lead ageing analysis. Dashboard & reports for analysis.

## Customers Delight



Manage Support Tickets. Time & cost analysis of support team. Create Ticket from Website/Email/SMS directly. Smart feedback to customers for instant feedback. Manage RMA. ISO Compliant SLA Management

If you already have Sugar CRM, then **we implement Sugar CRM.**  
If you don't have it, then **we provide Sugar CRM to you.**

**Find more customers**



Marketing

**Close more customers**



Sales

**Customers Delight**



Service

Do you need all three of these Functionalities ?  
We call it Fusion CRM (All in one)



**Fusion CRM**





## Alpha

Suitable for teams  
upto 10 members



## Delta

Suitable for teams  
upto 25 members  
integration with Email/SMS



## Omega

Suitable for teams  
bigger than 25 members  
integration Telephony  
Integration and API

# Right Fit for your Size & Requirement.





## Alpha

Suitable for teams  
upto 10 members



## Delta

Suitable for teams  
upto 25 members  
integration with Email/SMS



## Omega

Suitable for teams  
bigger than 25 members  
integration Telephony  
Integration and API

# Alpha, Delta & Omega Plans.

Plans apply for Marketing, Sales or Service or any combination there of. Combination is called Fusion CRM Plan. e.g.: Sales Alpha + Service Alpha = Fusion Alpha.

# Marketing Features - Lead Capturing & Contact Management

FEATURE DESCRIPTION	Alpha	Delta	Omega
Leads Capture (Direct Mails/Manual/ Trade-shows)	Y	Y	Y
Lead Assignment and Automated followups	Y	Y	Y
Capture Leads from Website		Y	Y
Capture Leads from Portals (Yellow Pages)			Y
Companies/Organisations/Customers	Y	Y	Y
Contacts/People	Y	Y	Y
Inbound Email to Lead		Y	Y
Inbound SMS to Lead		Y	Y
Marketing ROI Analysis		Y	Y

# Marketing Features

## Alpha

- ✓ Capture All leads from everywhere, can also specify lead source, campaign so that you can track and analyse your marketing efforts.
- ✓ Automatically assign leads to users based on the criteria that you define. (eg: based on city, product, or type of enquiry etc).

## Delta

- ✓ If somebody fills up a form on your website, a lead is automatically created in CRM instantly.
- ✓ Emails received to sales@yourcompany.com can go in CRM as leads, automatically and be assigned to a user.
- ✓ All SMS received at a particular Number or ID can go in CRM as leads and be assigned to a particular user.
- ✓ 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.

## Omga

- ✓ You have signed up on portals like Justdial, Indiamart, Commonfloor, Magicbricks, TradeIndia etc, If someone makes an enquiry on that portal a Lead is automatically created in CRM instantly.



# Sales Features - Lead Nurturing & Contact Management

FEATURE DESCRIPTION	Alpha	Delta	Omega
Companies/Organisations / Customers	Y	Y	Y
Contacts (People)	Y	Y	Y
Leads/Funnel Management, Track Deals	Y	Y	Y
Product Masters	Y	Y	Y
Product Management		Y	Y
Advance Quotations		Y	Y
Sales Forecast		Y	Y
Lead/Opportunity Aging analysis		Y	Y

# Sales Features

## Alpha

- ✓ Manage and track progress and activities on your Leads & Deals.
- ✓ Product Masters helps you classify your leads/deals and manage them accordingly.

## Delta

- ✓ Send Quotes from CRM. Also track various stages of Quotations (draft, quote sent, Negotiation stage, won, lost). Tracking of Quotes revisions.
- ✓ Product Management enables tracking of products quoted for, won and lost.
- ✓ Get detailed analytical forecast of Sales in coming months, weeks - product wise, user (salesperson) wise, region wise.
- ✓ 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.

## Omga

- ✓ You have signed up on portals like Justdial, Indiamart, Commonfloor, Magicbricks, TradeIndia etc, If someone makes an enquiry on that portal a Lead is automatically created in CRM instantly.

# Service Features - Support Cases/Tickets Management

FEATURE DESCRIPTION	Alpha	Delta	Omega
Companies/Organisations / Customers	Y	Y	Y
Contacts (People)	Y	Y	Y
Support Cases / Service / Ticket Management	Y	Y	Y
Product Masters	Y	Y	Y
Monitor Turn around Time (TAT)	Y	Y	Y
Product Management		Y	Y
AMC Contracts Management		Y	Y
RMA (Replacement Material Authorisation)		Y	Y
Inbound Email to Ticket		Y	Y
Inbound SMS to Ticket		Y	Y
Smart Feedback Integration		Y	Y
SLA Management / Implementation		Y	Y
Bug management (Root Cause Analysis)		Y	Y

# Service Features

## Alpha

- ✓ Create/Manage and track support tickets in CRM. Auto-assign to users based on product selected or city or any other criteria.
- ✓ Monitor your TAT (Turn around time) which your team takes to respond and resolve the tickets.
- ✓ Product Masters helps you classify your cases according to Product categories.

## Delta

- ✓ Product management helps you to manage inventory/Asset of your customers AMC, it will include details like Warranty period, AMC period etc.
- ✓ AMC/Contract Management helps you to manage AMC, get renewal reminders. Get AMC details while entering Support Case.
- ✓ RMA (Replacement Material Authorisation) manages entire Replacement process. Track pending RMA. Links with Support Cases/ Tickets.
- ✓ Ageing analysis of Leads help you identify leads before they go stale. Ageing analysis helps you to optimise Sales Process

## Omga

- ✓ You have signed up on portals like Justdial, Indiamart, Commonfloor, Magicbricks, TradeIndia etc, If someone makes an enquiry on that portal a Lead is automatically created in CRM instantly.



# Accounts and Contacts Management (Common Feature \*\*)

## Alpha

- ✓ Manage complete details of all your Customers/Clients companies/people etc.
- ✓ Unlimited Classification and categorisation possible which helps you in targeting your customers for Up selling and cross selling.
- ✓ Get analytical reports for discovering your potential clients for upsetting and cross selling.

## Delta

## Omga

\*\* Common for Marketing, Sales & Service CRM

# Activities & Task Management (Common Features)

FEATURE DESCRIPTION	Alpha	Delta	Omega
Calenders	Y	Y	Y
Appointment Managment	Y	Y	Y
Meeting Management	Y	Y	Y
Reminders	Y	Y	Y
Notes & Documentations	Y	Y	Y
Workflows & Approvals		Y	Y
Document Management		Y	Y

\*\* Common for Marketing, Sales & Service CRM

# Activities & Task Management

## Alpha

- ✓ Captures your tasks (inhouse and out of office) and visits and relates to deals / companies.
- ✓ Create and manage your calendar, meetings and reminders.
- ✓ 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).

## Delta

- ✓ Create detailed automation and workflows for alerts, notifications and approvals. eg: Quotation above certain amount requires approval from a senior person.
- ✓ Create and store documents that you frequently use in your business. eg: your NDA, SLA, Catalogues, Policy documents or even HR documents.

## Omga

# Email / SMS Features (Common Features)

FEATURE DESCRIPTION	Alpha	Delta	Omega
Calenders	Y	Y	Y
Appointment Managment	Y	Y	Y
Meeting Management	Y	Y	Y
Reminders	Y	Y	Y
Notes & Documentations	Y	Y	Y
Workflows & Approvals		Y	Y
Document Management		Y	Y

\*\* Common for Marketing, Sales & Service CRM

# Email / SMS Features (Common Features)

## Alpha

- ✓ Ability to create unlimited Email Templates to save time and conserve uniformity in communication. .
- ✓ Send email to anybody in CRM with a single click.

## Delta

- ✓ 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.
- ✓ Send automated Email / SMS to your customers or team members based on some activity/time lapse.
- ✓ Create Unlimited Templates for SMS so that everytime you want to send SMS, its just a click away.

## Omga

# Administrative Features (Common Features)

FEATURE DESCRIPTION	Alpha	Delta	Omega
Data Export	Y	Y	Y
Audit Logs	Y	Y	Y
Roles & Access Control	Y	Y	Y
Custom Fields	N	Y	Y
Custom Modules	N	Y	Y

\*\* Common for Marketing, Sales & Service CRM

# Administrative Features (Common Features)

## Alpha

- ✓ All the Data in CRM can be exported by Admin any time in Excel/CSV format, its instant and free.
- ✓ Create Audit Logs on Important Fields so that you know who changed what and when.
- ✓ 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..

## Delta

- ✓ Custom fields to accomodate any special data you want to collect according to your business requirement. Custom fields are also available for reporting.
- ✓ Custom Modules can be created to accomodate your business process.

## Omga

# Dashboards & Reporting Features (Common Features)

FEATURE DESCRIPTION	Alpha	Delta	Omega
Dashboards	Y	Y	Y
Ready to use Reports	10	25	50
Unlimited Customised Reports **		Y	Y
Scheduled reports		Y	Y
Colour coded reports		Y	Y
Score Card Views		Y	Y

\*\* Extra Customised Reports for Small Plan can be implemented at an Extra Cost.



# Dashboard & Reporting Features (Common Features)

## Alpha

- ✓ 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.
- ✓ Get predefined reports that give you indepth and intelligent insight into your business. Reports can be data based or even Graphicals with meaningful charts

## Delta

- ✓ Create unlimited number of reports as per your business requirements.
- ✓ Schedule reports for your team members and managers so that they receive their reports on Email @ a scheduled time.
- ✓ 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.
- ✓ View large sized meaningful scorecards for leads, cases & deals based on stages of those records.

## Omga

# Special Features (Common Features)

FEATURE DESCRIPTION	Alpha	Delta	Omega
User Activity Monitoring	Y	Y	Y
Data Deduplication tools	10	25	50
Enjoy Latitude Mobile App	Y	Y	Y
Linkedin Lead Integration		Y	Y
Shadow Login (Sudo User)		Y	Y
Inbound/Outbound SMS Integration		Y	Y
Telephony Integration			Y
Predictive Dialing			Y
Two Factor Authentication			Y
API Integration			Y
Restrict Access based on IP			Y

# Special Features (Common Features)

## Alpha

- ✓ **User Activity Reports:** Get analytical report of what your users are using, creating and editing in CRM. This report is emailed daily to admins..
- ✓ 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.
- ✓ 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.

## Delta

- ✓ 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 intelligently. This is a Google Chrome Extension. .
- ✓ 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).
- ✓ 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

## Omga

- ✓ **Telephony integration** with IPPBX (you can either use our Enjoy 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.
- ✓ **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).

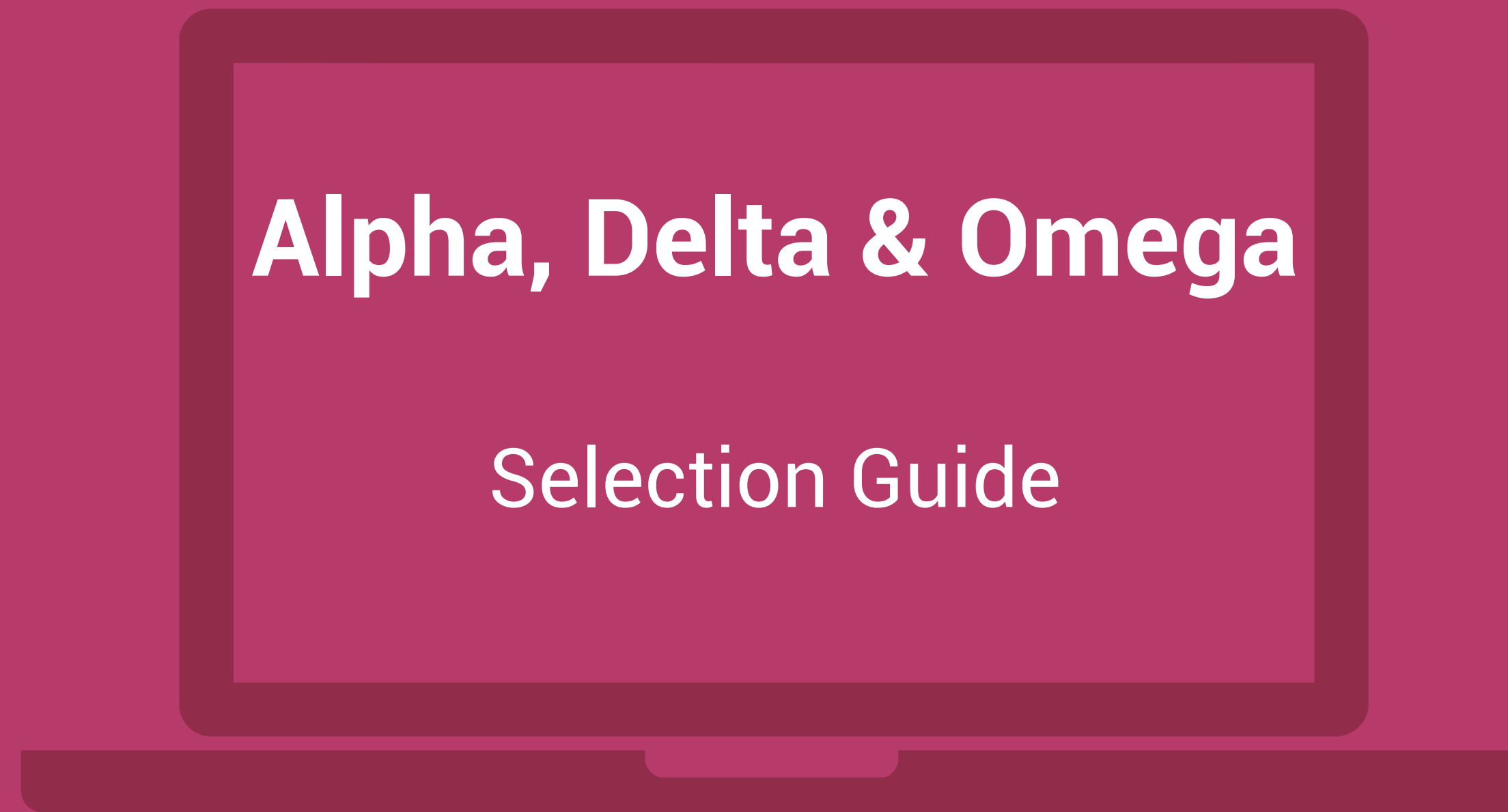
# Special Features Continued . . . . (Common Features)

## Alpha

## Delta

## Omga

- ✓ 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.
- ✓ CRM can be integrated with any other website or stand alone application or ERP or anything in the world using API.
- ✓ 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.



## **Extra Features / Integrations / Plugins / Add-ons**

Plans apply for Marketing, Sales or Service or any combination there of. Combination is called Fusion CRM Plan.

**e.g.: Sales Delta + Service Delta = Fusion Delta.**



# Optional Features

Toppings for your CRM !!!

**Extra Features / Integrations / Plugins / Add-ons**



## Knowledge Base

Create knowledge base for your internal Teams as well your customers. Ability to create KB Article directly from Bugs.

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.

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.

# 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

# Sync Quotes

Morbi leo risus, porta ac consectetur ac, at eros. Sed posuere consectetur cum sociis natoque.



# Sync Outstanding

Get Customer Outstanding from Tally ERP

# Projected Cashflow

Etiam porta sem malesuada magna mollis euismod. Nullam id dolor id nibh ultricies vehicula.



# Sync Tickets

Your customers create tickets on Freshdesk Portal and they get synced instantly in CRM.

# Savings.

You need to buy only 1 Freshdesk Account. All the Ticket management is done from within CRM.



# Sync Activity

If you or your Customer replies to that Ticket, that is also synced in CRM.

# Social Support

Freshdesk supports Ticket Creation using Social Media.

Twitter & Email integration for Ticket Creation.



# Next Step, Book a Demo

Call Enjay @ +91-9898007650

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