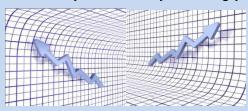
What is REDPOT CRM?

Maximize your sales by knowing your customer





What is CRM?

All your communication exchange with your customer or a prospective customer is very important to the growth of your organization, and CRM is a tool, which will allow you to get a 360 integrated view into customers & their relation with your products and services.

Now this looks simple isn't it. But frankly speaking, the CRM processes more complex tasks to give you simpler results of visibility into your Products & Services versus your Customers.

With new social media, communication exchange through modern gadgets, a lot has changed the way traditional CRM used to be. Now organizations need a greater insight into their customers to build competitive products and services. So lets see, how we can achieve "Maximizing Sales using REDPOT CRM".

REDPOT CRM Advantage

A successful CRM implemented Organization has the following advantages

- Save time on routine sales tasks
- · Greater visibility of Information across stake holders
- 360 Customer View (Customers Products Sales Delivery)
- Zero loss of communication correspondence with customers
- Cross Sell & Up-Sell Opportunities
- · Greater Depths on Sales forecasting
- Strategic Decisions towards better products and services
- · Easy Digital Marketing
- Automating Routine Functions Renewals, Invoices, Payment Reminders etc
- Web Integration Shopping Carts etc
- Integrate Leads from any web platform
- · Customer Behavioral Analysis etc.



Gain Customers – Marketing & Lead Integration

Generate leads by marketing your business on Online & Digital Platform and have common integration of leads into the CRM. See ROI on Marketing in REDPOT CRM. Custom Integration Integrate custom lead source Diallers / Call Centers EMAIL MARKETING Targeted Marketing YOUR WEBSITE Customer Behavioral Analysis Google Enquiry Form Adwords & Linkto Forms Linked in Integrate 3rd Party Sky is the Limit Social Insights of Customers **Dialer Data in REDPOT Email Marketing for CRM** Ask REDPOT team the **Targeted Audience** way you want your Simple API's to TAP into Integrated your enquiry custom lead sources to Send Email Campaigns Form on your Web site vour dialer database and be automatically integrated into REDPOT create lead information Track Response Prospects fill out a Web CRM into the REDPOT CRM form, which creates a Advertise on Social **Customer Behavioral** directly Media (Google, lead in REDPOT CRM **Analysis** Facebook etc) Link your landing forms Geographical Location Ability to assign to Impact to REDPOT CRM. specific users in the Multiple landing pages Gain Social Insights of CRM **Customers** approach for tracking **Chart Title** Single Click to know all best receivability **Shopping Cart** possible contacts in and 6 Integration to REDPOT **Measure Real-time** around your prospective CRM customer. 4 Sales 3 **Leads From Sources** 2 Sales Pipeline 1 ■ 1st Qtr 2nd Qtr

■ 3rd Qtr ■ 4th Qtr

Product Demand

Category 1 Category 2 Category 3 Category 4

Manage Customer Relationships

When you get a call or Email, start by searching REDPOT CRM. Get insights to Historical Relationship of the customer with your company and its products and services



a call or email

you to quickly get hold of the information you are looking for about the Customer

Multiple Search Fields are available on great width of data that's available

History Mails, Notes, Reminders, Alerts etc



Delivery Tracker Courier, Delivery Tracker

Historical Insight

Single window view, with respect to all the Emails, Forecast, Sale, Reminder, Communication and other approval related information

Messages from even Skype are integrated into the REDPOT CRM

Payment Information

REPOT CRM Provides view which can allow you to quickly access the invoice and payment related information

At any point of time, REDPOT CRM allows you to pullout the original invoice that's sent to the customer.

Provision to Track Part **Payments**

Delivery Information

REDPOT CRM allows you to track delivery of you products and services to your customers.

A API is also provided which can captured physical delivery of the goods by the customer

Manage Vendor Relationships

With REDPOT CRM, Your Organization can effectively manage Vendor Relationships. From Email Communication –to- Closing a Payment on a Invoice You can do many activities involved in Vendor Management with REDPOT CRM

Vendor Product Catalogue

Vendor Induction

A Vendor is Introduced

Based on your company requirements a Vendor is introduced into the REDPOT CRM 2 Vendor Product

Catalogue in REDPOT CRM
Product Catalogue of

the Vendor is inducted into the REDPOT CRM Product Catalogue is unique to the Vendor in REDPOT CRM

Product Catalogue is Manageable

Raise PO's

3

Raise PO's

REDPOT CRM allows you to raise PO's against your vendor

The PO can be internally tagged to a SalesOrder

The Sales Order can be a Internal Order or a PO from an external customer on a specific requirement

Issue Goods Receipt Track Payments

4

Goods Received Returned information

REPOT CRM Provides Provision to Track Received and Returned Goods as part of a PO

The Goods Receipt information can be printed out or can be extracted as a PDF and sent to the customer

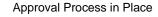
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Payments against Invoices

REDPOT CRM allows you to upload the Physical Invoice, Invoice Details such as amount, invoice date, notes against it in the CRM

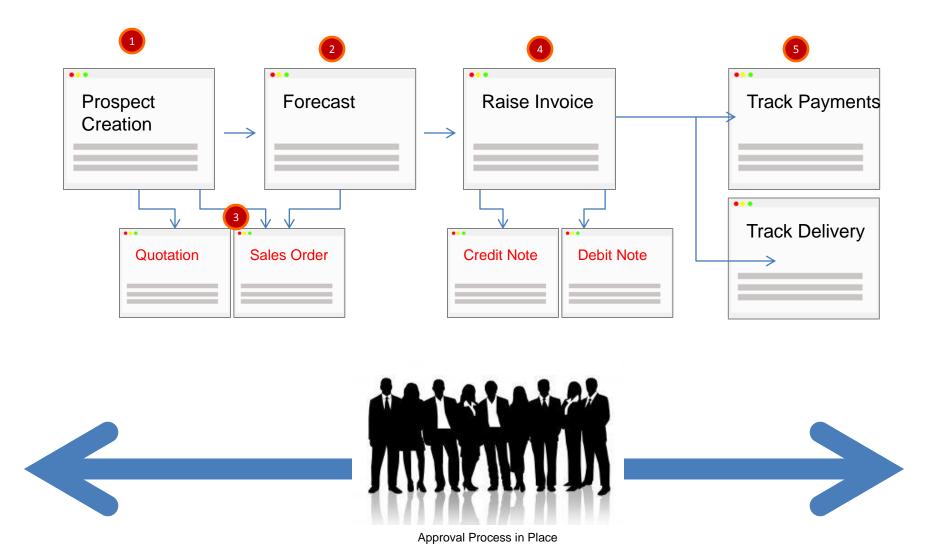
Custom Payment Status can be configured to maintain different payment status in the system





Customer Management From Lead to Sale

With REDPOT CRM, Your Organization can effectively manage Customer Information, Forecast, Close to Sale to Raise Invoice, Also issue credit and Debit Memos on various transactions. REDPOT CRM also allows you to raise Quotes, Sales Orders for Customers



Document Management System

Effectively Manage your internal and external documents with REDPOT CRM. Allow Rating, Changes, Comments and Version Management on

Documents

Customer
Or Internal
Documents

A need to store and manage documents

Based on your company requirements you can store any document and index it for searching later

You can also allow other users to comment, rate, view and add new versions to your document

Name Root

- Customer
- PO etc,

Upload Docs

Share, Search, Comment, Rate

3

All

Store your documents under a name, which can be

Name your principal root folder and start

- Customer Number
- Company Name
- Project

uploading

1. Purchase Order etc

Start Uploading Documents

Allow other users by Role Access to

- 1. View
- 2. Upload new documents under tree
- Rate Document
- Comment

Easy Search on Documents

All users can search DMS.
Results show-up based on the user privileges on the documents.

Users can rate, comment, download documents.



User Role based Access to Documents

Security

Three Level Security to your CRM



Independent IP

192.xxx.xxx.xxx

Option of HTTPS
HTTPS





REDPOT CRM is cloud based

Cloud based CRM allows you to access CRM on variety of devices, such as Desktops, Notebooks, Mobile Applications, Ipads etc.



Restricted access to IP

REDPOT CRM allows, you to give restrictive access to IP's which you intend to give access to.



Option to interact only via HTTPS

REDPOT CRM allows you to put up the entire instance on HTTPS.

Accessing Web Pages over HTTPS protocol is encrypted



User Level Access

User level access can be provide at each page of the CRM

Note: RED POT INFOTECH PVT LTD can offer customized solution for further security, such as VPN Token access, Installation of custom Security Certificate etc. For more information email sales@redpotcrm.com

Contact Information

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