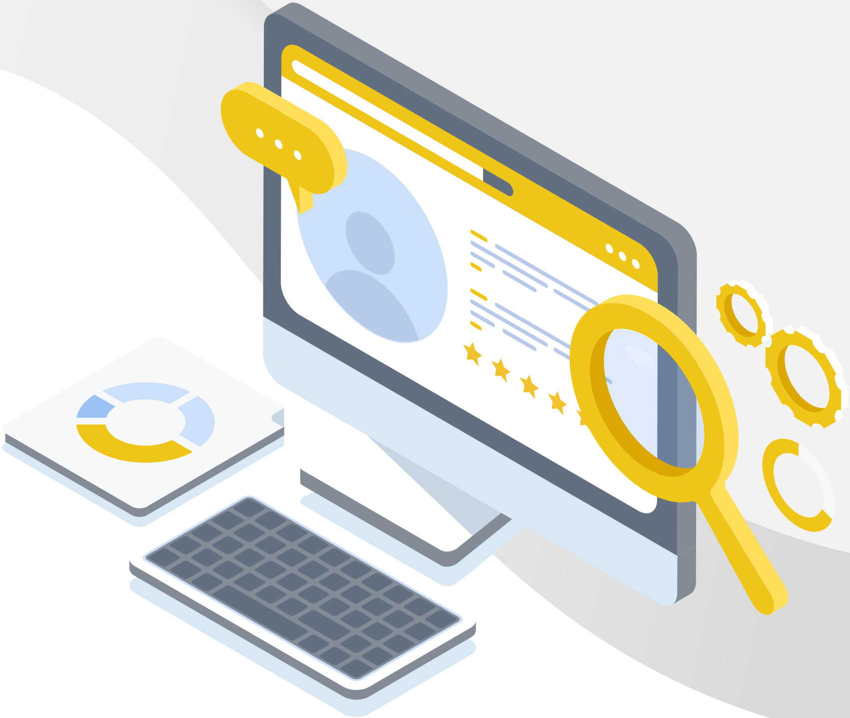
HELLO PIXELS



CRM

Functional Modules

www.hellopixels.com

Contents

It’s hard to imagine a world without CRM! Manage interactions with potential customers and build a successful organization with improved profitability! CRM is a long-term process with the combination of business strategies and software that helps to build an ever-lasting relationship between companies and their customers.

What is CRM?

CRM usually refers to all techniques, strategies, tools, and technologies used by enterprises for developing, retaining, and acquiring customers. CRM software gathers data from multiple channels and provides information based on the purchasing behavior pattern. With the help of professional CRM software, it’s easy to find new customers, gain their trust, provide qualified support, and explore additional services throughout their relationship!

Benefits of having a CRM

- Connect with customers
- Dashboards that visually showcase data
- Do business anywhere
- Trustworthy reporting
- Proactive service
- Improved messaging with automation
- Safe guard your business
- Efficiency enhanced by automation
- Simplified collaboration

CRM for Small Enterprise

You have much to do in the business world! While starting with a small business, give first priority to your customers! Having a CRM will allow you to manage the daily leads and contacts! As your company grows up, generate more leads, close more deals, and build more effective relationships.

Implementing CRM in your small business helps to organize your contacts, leads, and deals. CRM simplifies time consuming process into automation focusing more attention on forming strategies to interact with customers!

Small businesses have a small sales team and so, keep up the productivity streamlined! Implement an innovative CRM that provides stellar customer experience and build your brand loyalty!

Why choose our CRM?

- We make it easy – our CRM comes with an easy to use interface! Start selling in no time!
- We customize it – our CRM offers a vast number of customization options that fit your business processes with a skillful technical team.
- Quick on boarding – we make it easy to migrate existing sales data into a new CRM.
- Well integrated with other tools – the CRM easily integrates with other tools used in your business process.
- Security – our CRM offers both security and reliability through various features like audit logs, IPs, encryption, and two-factor authentication.

Our CRM turns out to be an appropriate solution with simple and easy to use features! Adopt an innovative CRM that fulfill your business needs completely, track your business process effectively, and identify opportunities for selling in the future!

Demo Links

Admin Panel
URL : https://crm18.hellopixels.com/admin/
Email: demoadmin@gmail.com
Password: demo@crm123

Staff Panel
URL : https://crm18.hellopixels.com/admin/
Email: staff1@test.com
Password: demo@crm123

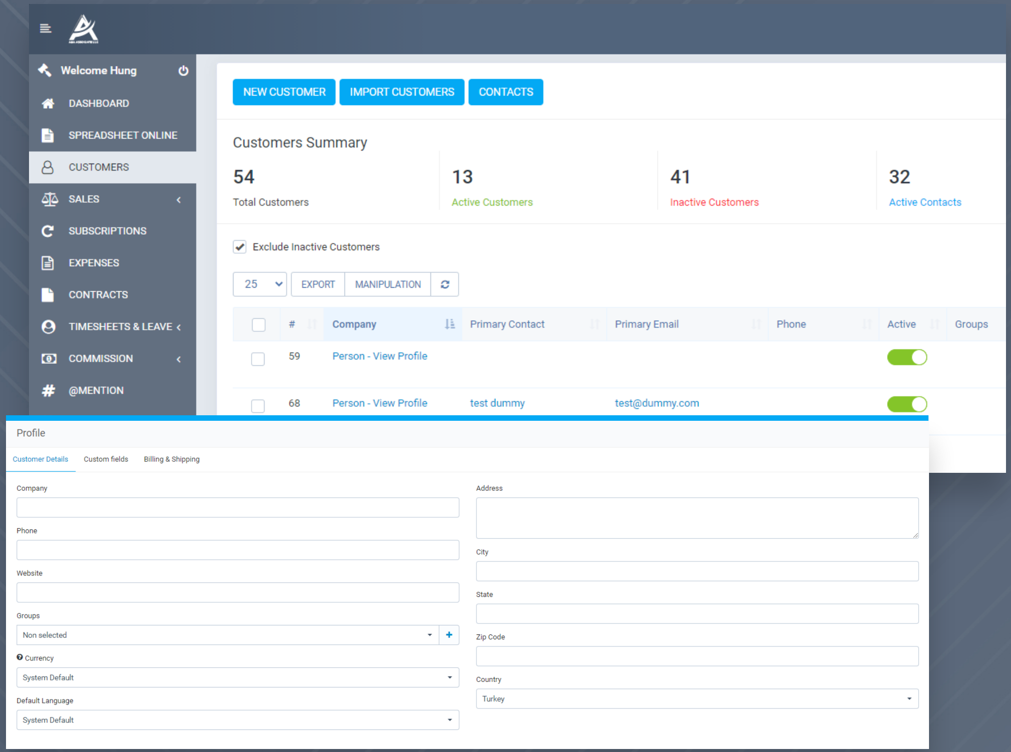
Client Panel
URL : https://crm18.hellopixels.com/
Email: demo1@gmail.com
Password: demo@crm123

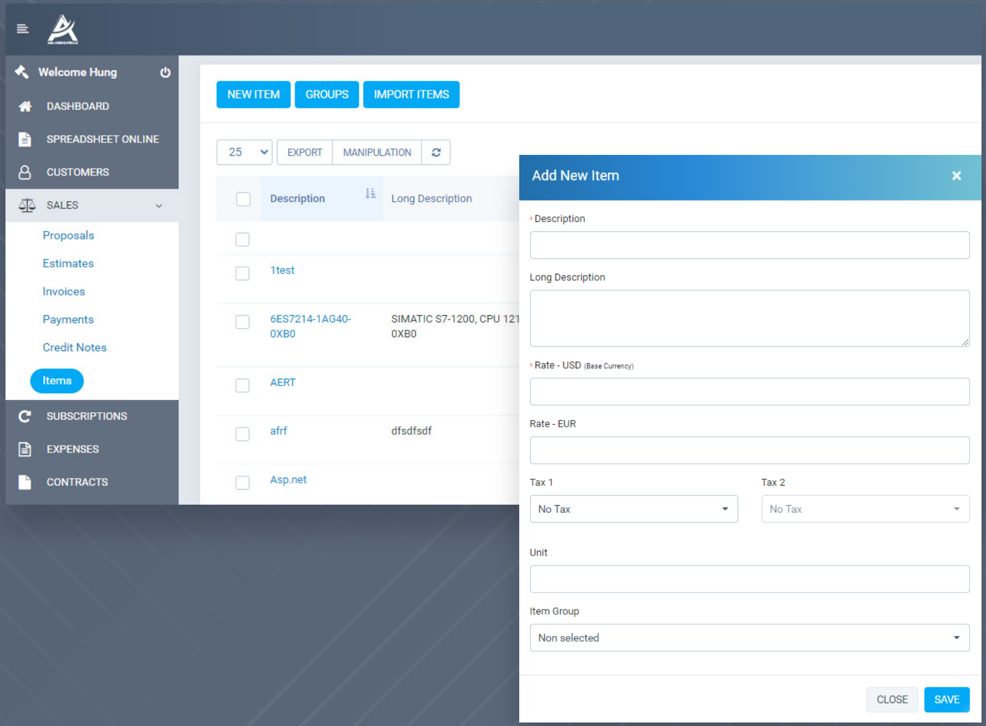
Customer
Relationship Management

Customer Relationship Management software that is a great fit for almost any company. It can help you look more professional to your customers and help improve business performance at the same time.

Contact Management

- Sending proposal to customer or lead
- New customer contact
- New customer
- Customers registration
- Customer admins
- Customer Reminders
- Exporting customers invoices/estimates /payment to ZIP
- Reports



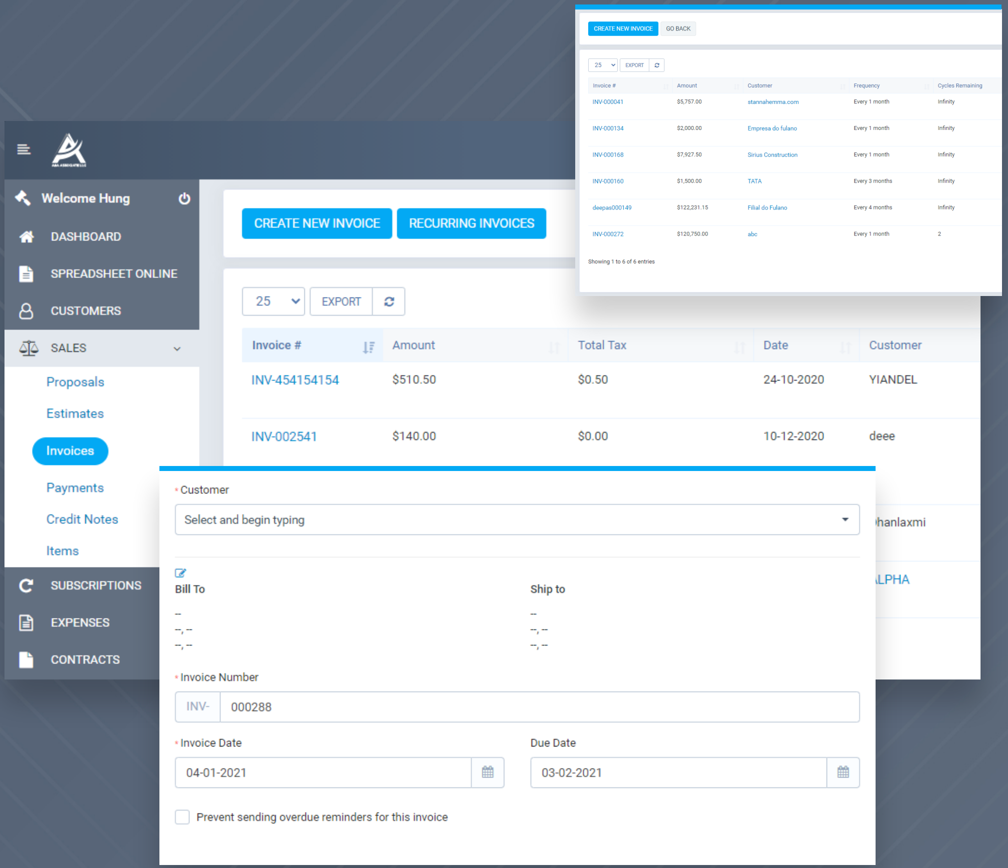


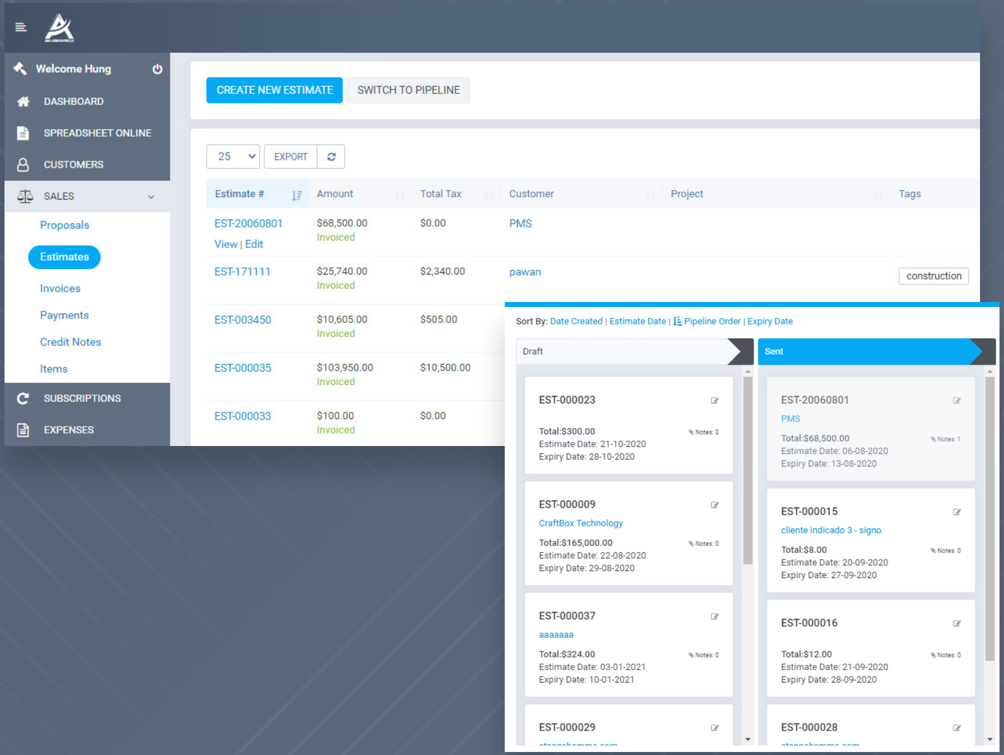
Sales Management

- Proposals
- Estimates
- Invoices
- General
- Subscriptions
- Sending proposal to customer or lead
- Currencies
- Add items/products
- Payment modes
- Recurring invoice
- Send invoice to email

Invoices

- Merging invoices
- Invoice overdue notices
- Record invoice payment
- Send invoice to email
- Recurring invoice
- Exporting customers invoices/estimates /payment to ZIP



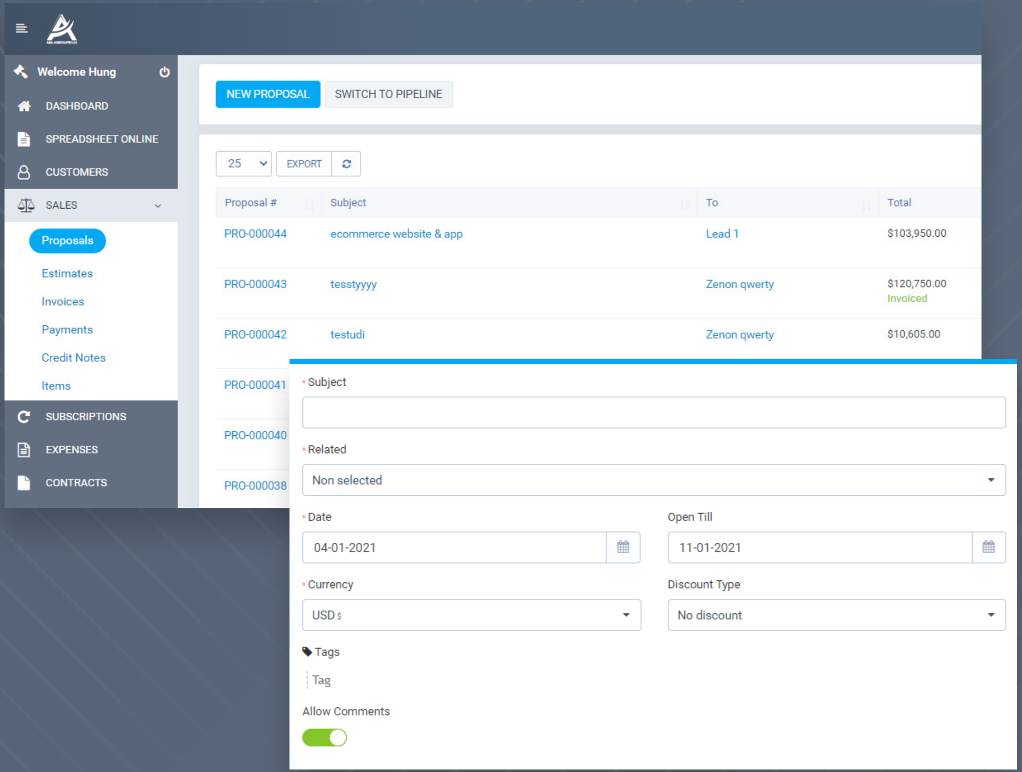


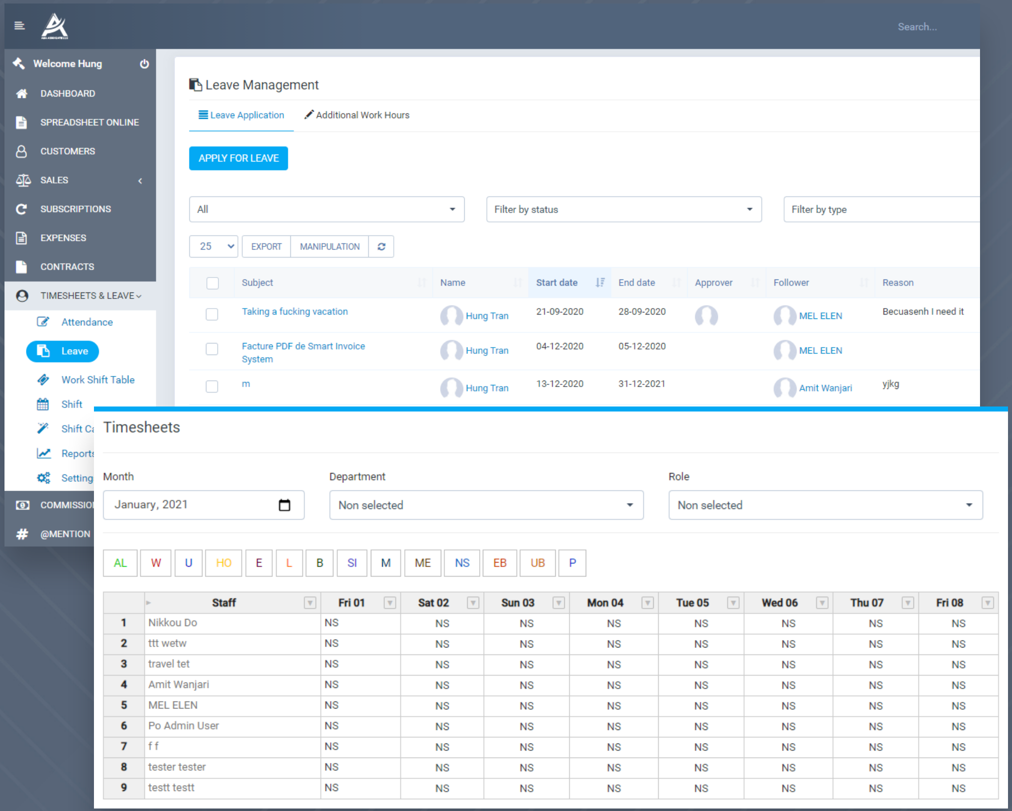
Estimates

- Link estimate to project
- Send estimate to email
- Converting estimate to invoice
- Create estimate
- Converting proposal to estimate/invoice
- Exporting customers invoices/estimates/payment to ZIP

Proposals

- Proposal expiration reminders
- Sending proposal to customer or lead
- Converting proposal to estimate/invoice
- Create proposal
- Proposals templates





Timesheets and Leave Management

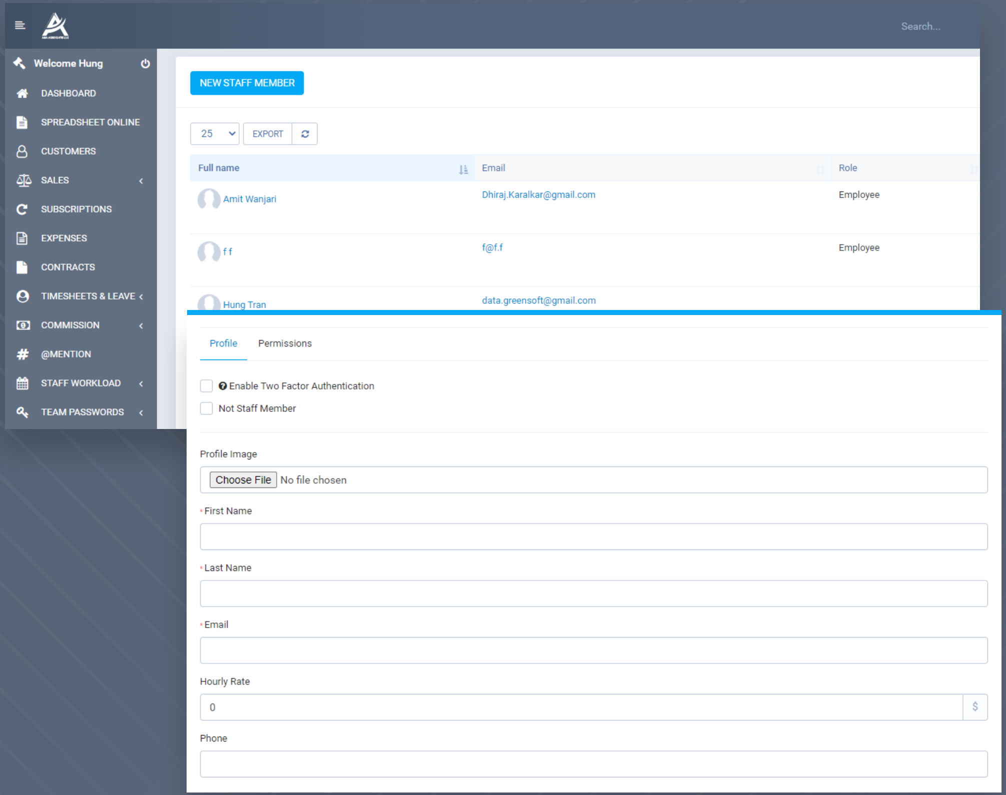
Timesheets & Leave module is a complete online time and attendance solution for employee time tracking, project time tracking, leave management and shift planning.

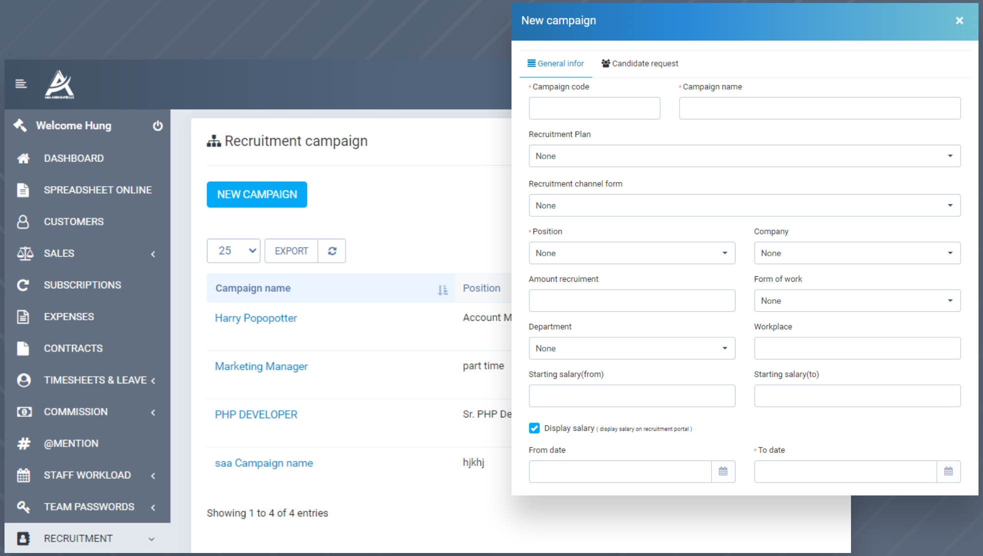
- Track your time easily and efficiently
- Efficient staff holiday planner
- Easy tracking of all absences
- Define approval workflows
- Easy shift planner
- Effectively plan and manage shifts

Human Resources Management

Human Resources Management module helps companies save time and manage their Human Resources directly inside their dashboard.

- Staff management
- Contracts management
- Insurance management
- Shifts management
- Payroll management
- Allowances
- Job Positions
- Workplaces
- Salaries
- Pay slips

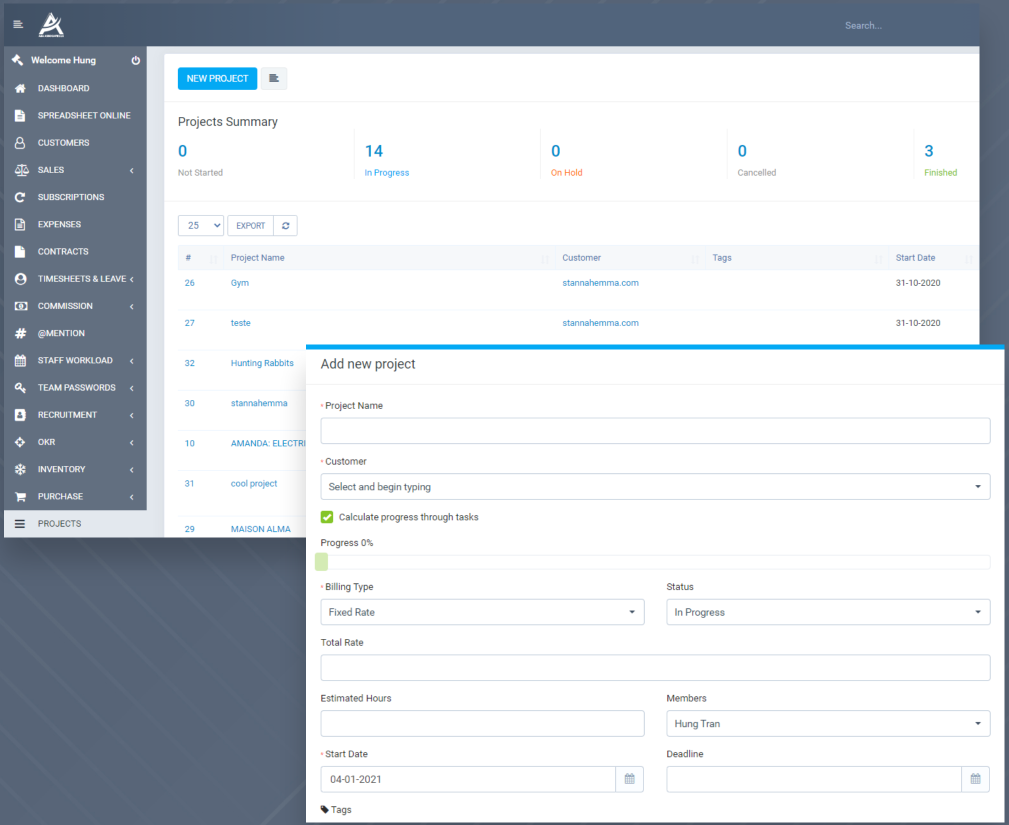




Recruitment Management

Recruitment Module is a set of tools designed to automate and manage your organization's recruiting and staffing operations. From posting your jobs to keeping applicants connected and engaged throughout, Recruitment Module lets you manage your entire recruiting process.

- Create recruitment form
- Recruitment Portal
- Apply for job
- Create job
- Create candidate evaluation sets
- List of evaluation criteria
- Candidate evaluation forms
- Create on Boarding Process
- Create Skills
- Create recruiting proposal
- Create recruitment campaigns
- Create candidate profiles
- Create interview schedule
- Evaluation of candidates

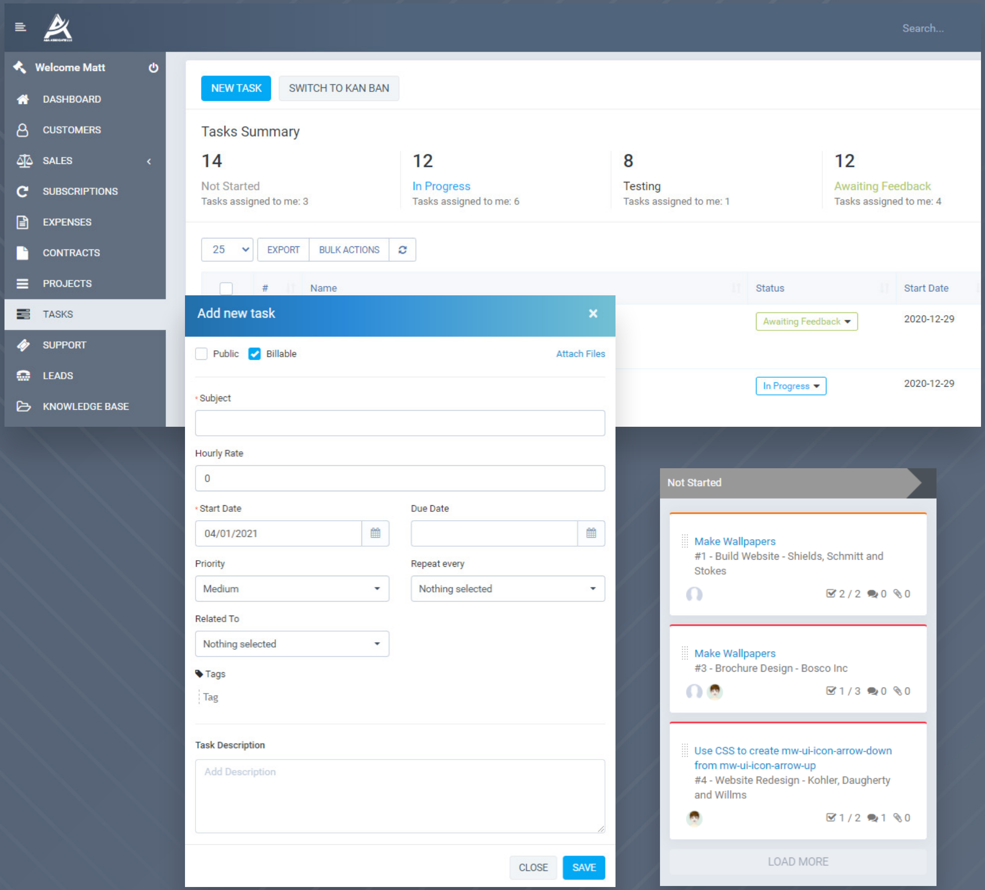


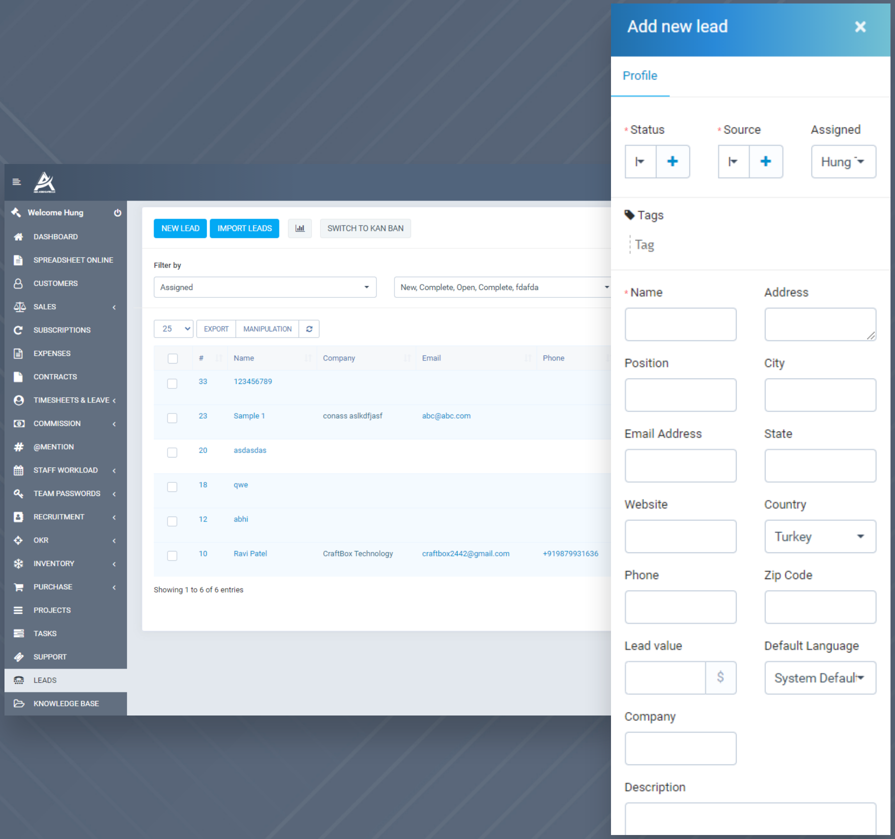
Project Management

- Add New Project Status
- New Project
- Timesheets
- Invoicing Project
- Disallow project members to see all project tasks
- Pin Projects
- Finance Overview

Task Management

- Add new task status
- Recurring tasks
- Disallow project members to see all project tasks
- Task timesheets
- Linking task to features
- Bill tasks
- Add task assignees



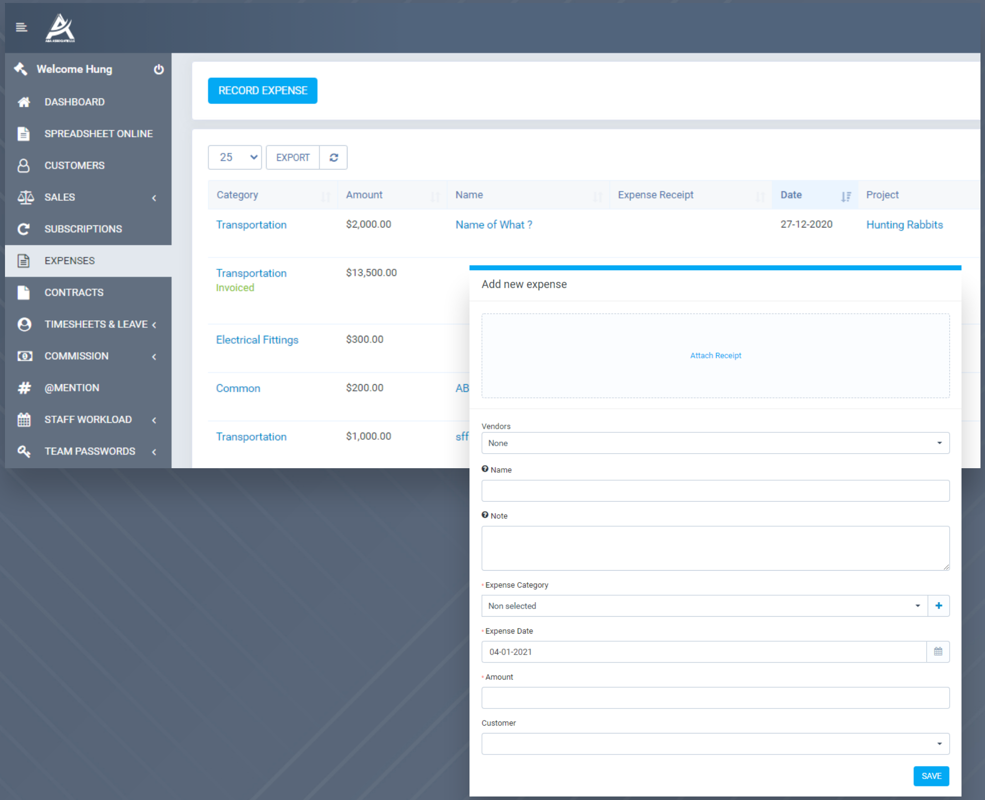


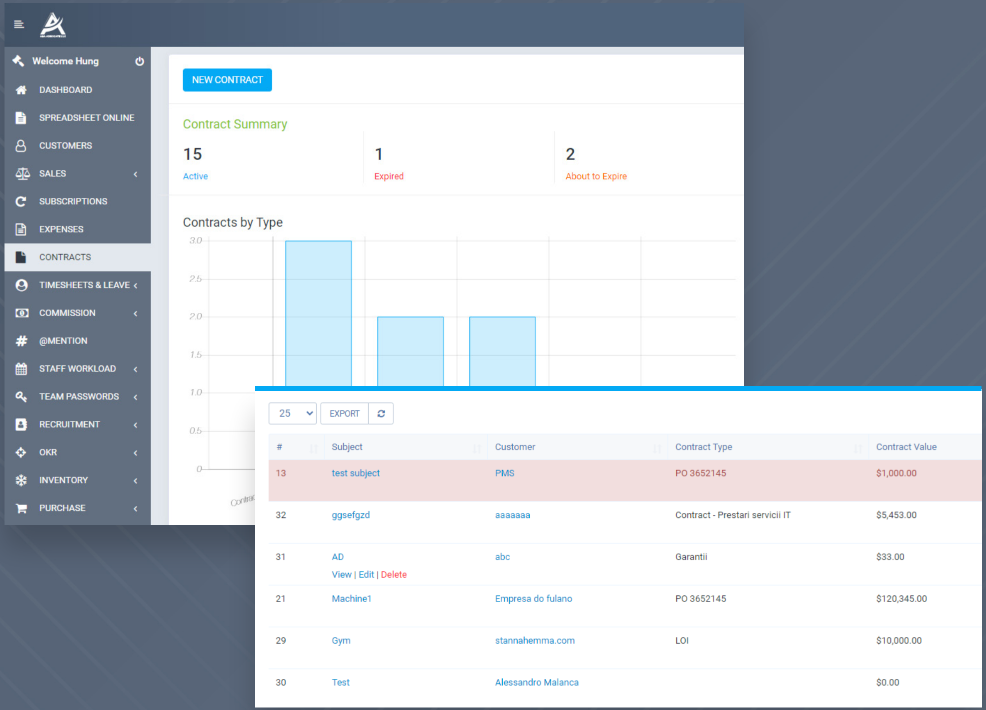
Leads Management

- Import leads from WordPress contact form 7
- Leads email integration
- Setup web to lead form
- Sending proposal to customer or lead
- Create new lead
- Convert lead to customer
- Lead sources

Expenses

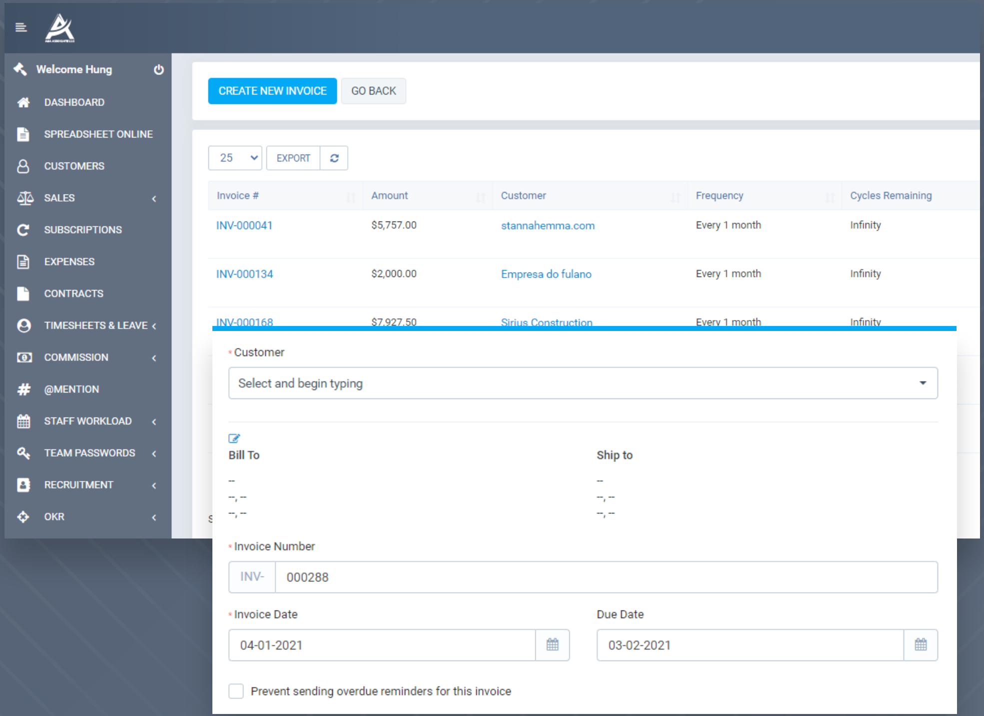
- Record expense
- Expense reports
- Creating recurring expense
- Billable expense
- Converting billable expense to invoice





Contracts

- Contracts templates
- New contract
- Contract expiry notification
- Renewing contract

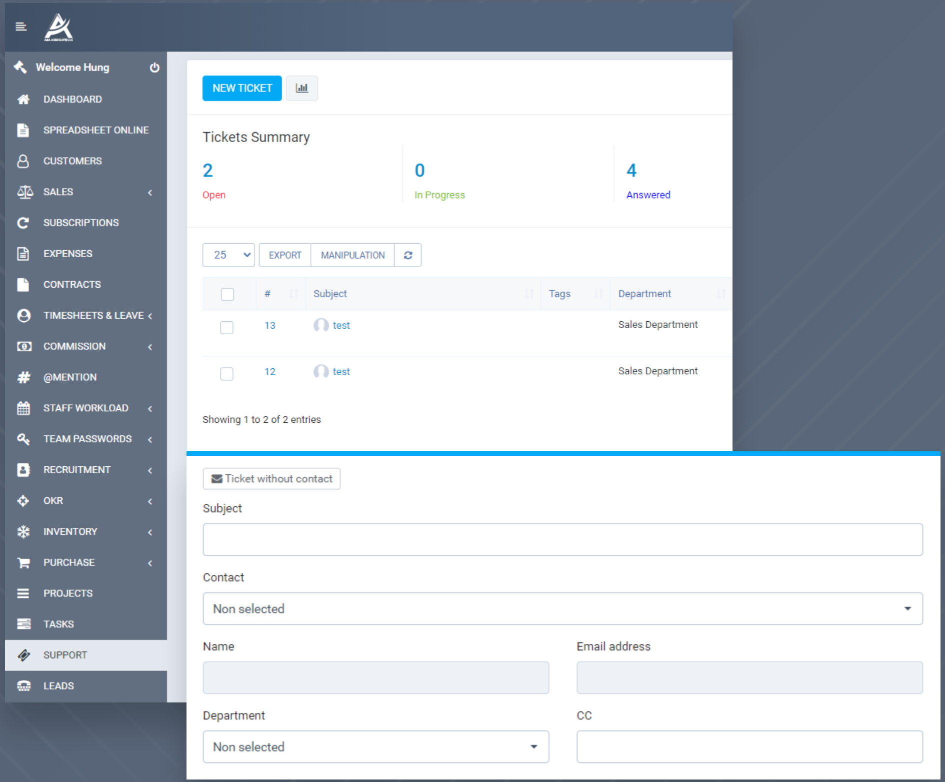


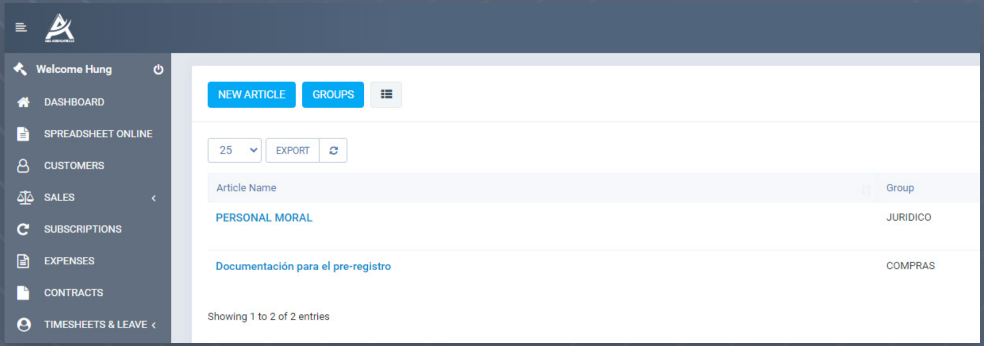
General/Setup

- Subscriptions
- Sending proposal to customer or lead
- Currencies
- Add Items/Products
- Payment Modes
- Recurring Invoice
- Send Invoice to Email

Support Tickets

- Email piping / auto importing tickets
- Setup ticket form
- Ticket services
- Departments
- Ticket email templates
- Auto close tickets
- Allow access to tickets to non-staff members



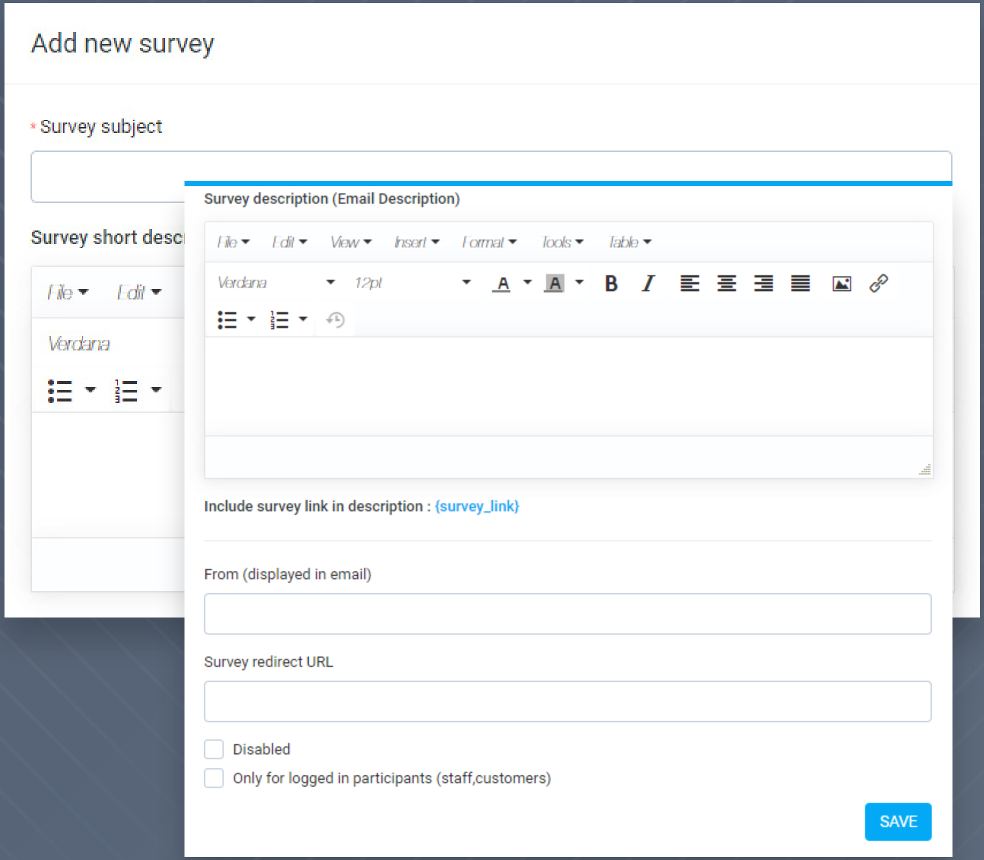


Knowledge Base

- New knowledge base article
- Disabling knowledge base
- New knowledge base group

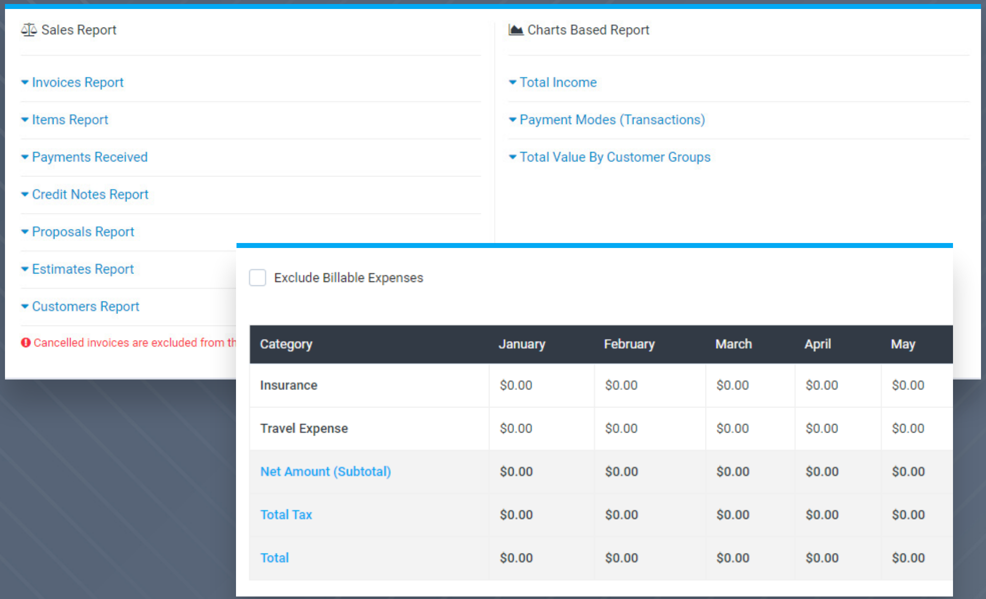
Surveys

- Creating mail lists
- Sending surveys
- New survey questions
- Viewing survey results
- Including mail list custom fields
- New survey
- Sending survey to mail lists



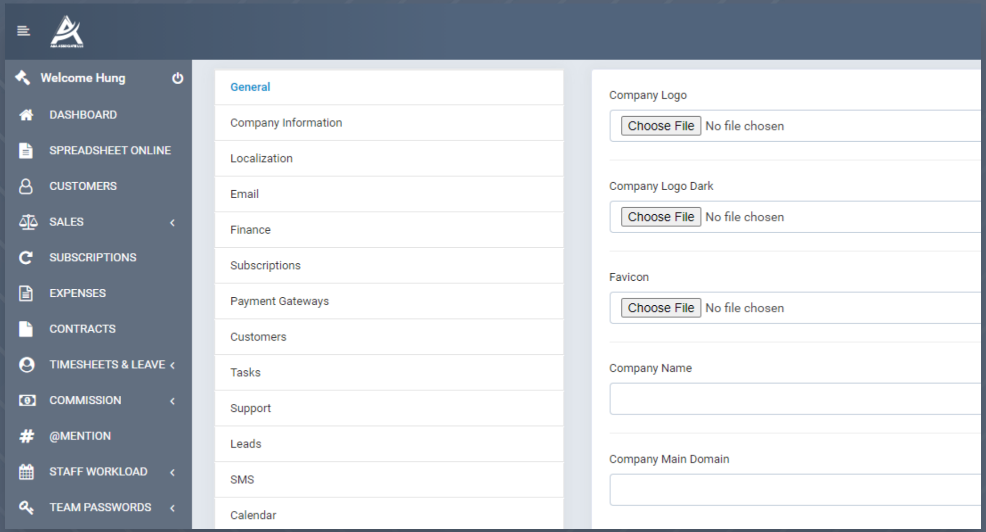
Reports

- Reports
- Sales
- Expenses report
- Reports by customer
- Custom date picker
- Leads conversions
- Knowledge base articles (Track if your article is useful to clients, improve text based on votes)



Settings

- Setup Real time notifications
- Add custom field for company
- Currencies
- Tax rates
- Payment modes
- Custom fields
- Time zone
- Roles
- Departments
- Email templates



Add-ons

- Assets Management Module
- CRM Chat
- Human Resources
- Management
  Customer Feedback Module
- Inventory Management
- Purchase Management
- Timesheets & Leave
  Management
- Supplier Management

WhatsApp Module

WhatsApp Module is a module that allows you to integrate the famous WhatsApp contact button, onto your Customers Area and/or Administration area.

All-in-one Support Module

By using this module, you enable your customers or staff members, to directly contact you through all the available options, straight from their accounts.

HELLO PIXELS

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