



Realize Your Ideas

Calsoft CRM

Efficient Lead Management with Sales at
its Heart Capture, Assess, Direct, and
Monitor Leads & Activities

Get In Touch With Us

+91 94448 60882

admin@dspeedup.com

www.calsoftgroup.com



CRM Challenge That SMEs Face



High Costs for Add-ons

CRMs that do not offer built-in customization may charge for additional modules or third-party integrations, leading to unexpectedly high costs and increased complexity

Scalability Limitations

As businesses grow, their needs evolve. A CRM that cannot be customized may struggle to scale alongside a company's expanding requirements, resulting in the need for frequent system changes or replacements



Complex User Experience

When CRMs cannot be tailored to match a business's specific processes, users may find the system difficult to navigate, leading to low adoption rates and inefficient use

Limited Industry-Specific Features

Businesses in specialized industries often require specific functionalities that generic CRMs may not provide, reducing the effectiveness of the system for those users



Inadequate Reporting and Analytics

Businesses often require custom reports and data analytics to gain insights into their operations. CRMs that lack customization may not offer the specific metrics or formats needed, hindering data-driven decision-making



Low User Adoption

If the CRM does not align with the team's workflow and preferences, employees may be reluctant to use it, leading to poor adoption rates and minimal return on investment





Why You'll Love Calsoft CRM



Built specifically for growing businesses with customizable features



Easily adapts to your unique business needs



Scales smoothly as your business expands



Integrates effortlessly with your existing tools and systems



Provides clear analytics and custom reporting



Tailored industry-specific solutions for your operations



Affordable pricing with no hidden fees or extra charges



Client

AIRUWATER

ReechPharma
- Formulations & Drug Delivery -

**Mark
Care**



**CLINEVO
Technologies**



**Sadham
Solutions**



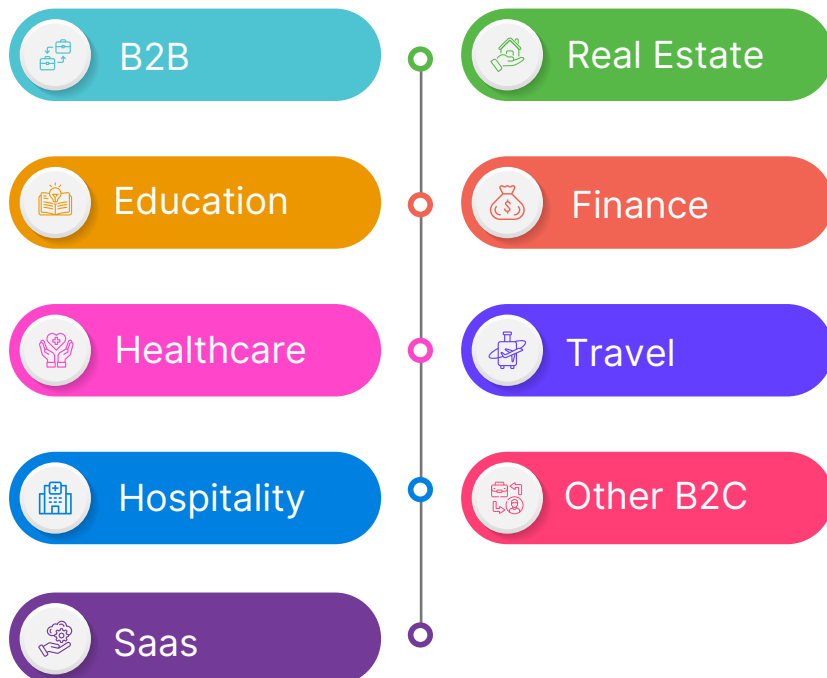
Infinity
SOLUTIONS



Kovai Classic Industries
An ISO 9001:2015 Certified Company



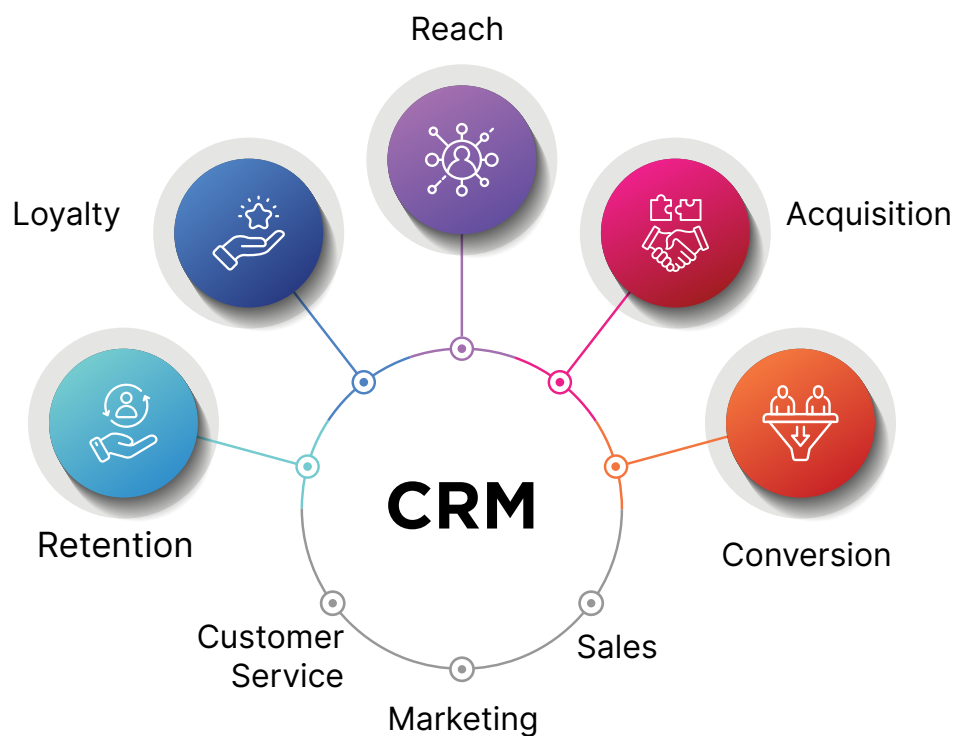
Ready Made CRM For Your Industry



Manage Leads and Accounts

Without Any Hassle

No more information discrepancies. Get one view of leads for all





FEATURES

Lead Management System

Quickly capture your Leads from various sources, understand which ones to Convert into Deals & which ones to disqualify

Customers

Promotions

Newsletter

Cms

Reports

System

Medical

Crm

Hr

Working : 00:00:00

Offline

Calsoft1

today's Date : 08-02-2025

Lead | Home > Lead

Lead

Search...

WALKIN (ALL)

FAVOURITE (ALL)

Lead ID

PRIORITY

NAME

PHONE NO

STATUS NAME

UPDATED DATE

WALKIN

FAVOURITE

LEAD ID

PRIORITY

NAME

PHONE NUMBER

STATUS

UPDATED DATE

WALK IN

FAVOURITE

ACTION

236

M

Balu

9791142679

completed

Feb 7, 2025, 4:2...

399

M

Sample

132444325325...

completed

Feb 7, 2025, 4:0...

267

M

Prathaa

6383137213

intreste

Feb 7, 2025, 10:...

357

M

Test lead

7358441198

Followup

Feb 6, 2025, 3:...

398

M

Balu

9786768786

Pending

Feb 6, 2025, 3:...

397

M

saga

919846531232

Pending

Feb 6, 2025, 12:...

396

L

test

123334567888

Pending

Feb 5, 2025, 5:1...

395

H

alijth karikalan

951236547

Pending

Feb 4, 2025, 6:...

- Capture leads using lead capture forms and from 3rd party apps
- Bulk import leads
- Assign leads automatically to the right sales rep using Calsoft Routing Engine
- Manage your leads: analyze them by source, owner, 'created at' and 'updated at'
- Multiple 'Custom Fields' and 'Smart Filters' on Leads
- Upload all relevant documents on leads
- Quickly capture your Leads from various sources
- Perform bulk actions such as sending WhatsApp messages or changing the statuses or owners of multiple leads at once



#FEATURES

Deal & Contacts Management

Manage Deals, their value and the win probability, get quick visual access to analyze them by pipeline stages. Use calsoft CRM for true Account Based Marketing with multiple Contacts on a Deal

Deals | Home > Deals

DEALS NAME	AMOUNT	STAGE	CLOSING DATE	ACCOUNT NAME	CONTACTNAME
yuvan	20000	Needs Analysis	Dec 19, 2024, 5:15:36 PM	ajith	balu
balu	10000	Qualification	Jan 5, 2025, 10:03:22 PM		ramu
kumar	2000	Qualification	Nov 19, 2024, 10:46:53 AM	2000	balu

Items per page: 10 1 - 3 of 3

- Get insights on deals, their value and estimated closure date
- Use smart filters for sharper analysis on deals
- Understand which rep is closing deals faster
- Nurture client for multiple sales products
- Share deal information within the team for better collaboration
- Monitor multiple deals for an account



#FEATURES

Smart View

Smart View in Calsoftcrm is a feature designed to help users manage their leads and prospects more effectively by providing a customizable and organized view of lead information

calsoft

Da

Dashboard

Sales

Catalog

Customers

Promotions

Newsletter

Cms

Reports

Smart Views List | Home > Smart Views List

Sales Person

Onboarding

Welcome Call

Domain Purchase

Implementation Work

QC Check

Handover website

Activity

Smart Views List

Search...

Q

C

F

NAME	EMAIL	PHONE NO	STATUS NAME (ALL)	SOURCE NAME (ALL)	ACTIVITY COUNT	CREATED DATE	UPDATED DATE	
NAME	EMAIL	PHONE NO	STATUS	SOURCE	ACTIVITY COUNT	CREATED DATE	UPDATED DATE	CAMPAIGN NAME
fsaf		fasfasfsafa111	Sales Person	website	1	Nov 29, 2024, 12:38:12 PM	Nov 29, 2024, 12:38:17 PM	
fsaf		fasfasfsafa	Sales Person	website	1	Nov 29, 2024, 12:34:43 PM	Nov 29, 2024, 12:34:43 PM	
Pathirakali	idtpl.admn@gmail.co m	6379650970	Sales Person	facebook	5	Oct 13, 2024, 10:42:22 AM	Nov 13, 2024, 11:20:04 AM	
sd		70926 51720	Sales Person	website	3	Oct 17, 2024, 6:32:50 PM	Nov 13, 2024, 11:00:37 AM	
Balaji Clg		9384921642	Sales Person	website	33	Sep 18, 2024, 10:39:36 AM	Oct 19, 2024, 4:41:01 PM	

Items per page: 10 1 - 5 of 5 < > >>

- Customizable Layout: Personalize the display to show relevant lead information
- Filter Options: Filter leads by criteria like status, source, and date
- Segmentation: Organize leads into categories for targeted marketing and sales efforts
- Real-time Updates: Access the latest information on lead activities for timely decision-making
- Custom Views: Create and save multiple views for different teams or purposes, enabling tailored experiences



#FEATURES

Data Management

The true value of a CRM is when you are able to capture more & relevant data. Cleaner data results in timely insights, better decisions and faster growth

The screenshot displays the Calsoft CRM interface. On the left is a vertical sidebar with icons for Customers, Promotions, Newsletter, Cms, Reports, System, Medical, Crm, and Hr. The main content area is titled 'Lead Details' and includes a 'Back' button. Below this is a blue card for a lead named 'Balu' with status 'completed', phone number '9791142679', and name 'Sample'. A 'Requirement Property' table is shown below the card:

Requirement Property	
Owner	jana@gmail.com
Lead Source	Incoming
Lead Age	135 Days Ago

At the bottom of the sidebar is a button labeled 'Open Doociti Call'. The main area also features tabs for 'Task', 'Lead Actions', and 'Invoice'. Below these are tabs for 'Activity History', 'Lead Detail', 'Tasks', 'Notes', and 'Original Lead Format'. The 'Activity History' tab is active, showing a timeline of events: '230 Days Ago', 'Sep 26, 11:30 AM' (Outgoing call made by karti@gmail.com to 9791142679. Duration: 26 seconds.), '229 Days Ago', 'Sep 25, 3:47 PM' (Outgoing call made by baluspark24@gmail.com to 9791142679. Duration: 0 seconds.), and 'Sep 25, 3:38 PM' (kkkkk, Added by admin@calsoftgroup.com).

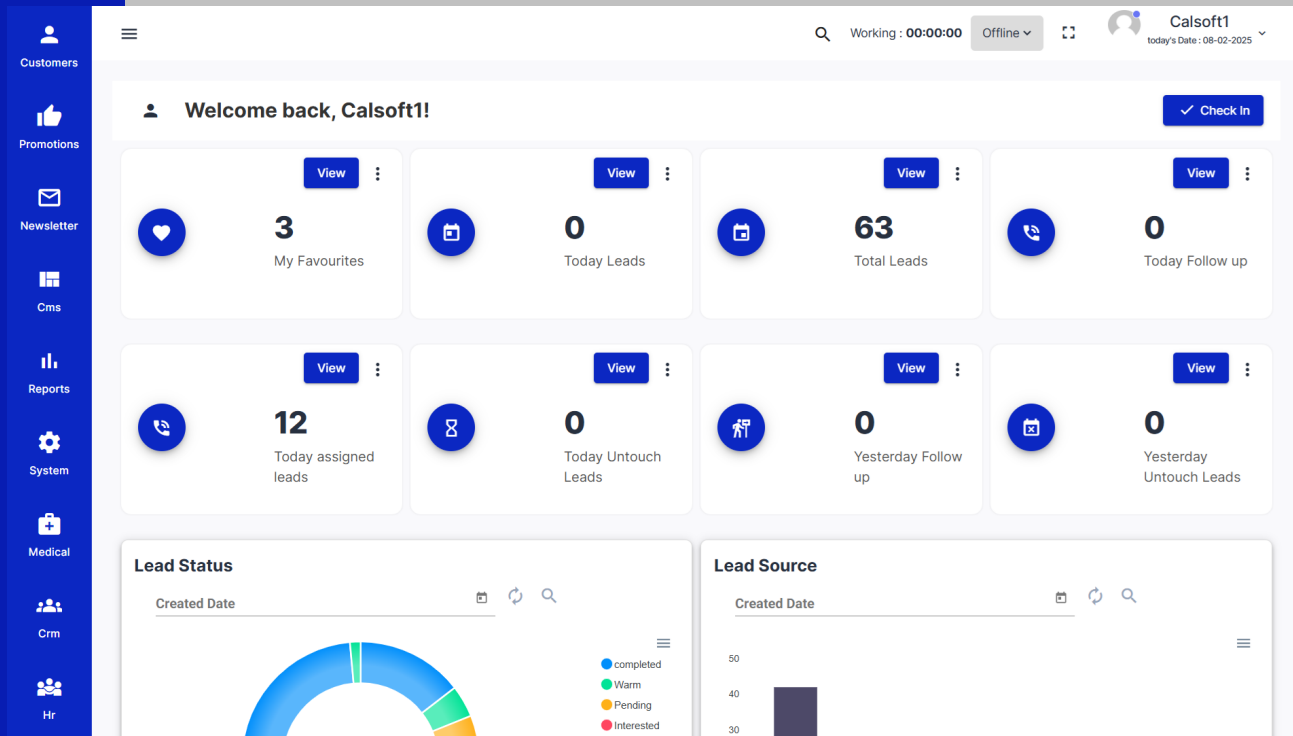
- Import or migrate data from other crms or excel
- Export the data within a few clicks
- Bulk update data with a few clicks- leads, deals and tasks
- Sync calsoftcrm with 3rd party apps using webhooks and Apis
- Prevent duplication of data
- Access right data effortlessly with the help of filters
- Create custom forms for different lead status



#FEATURES

Productivity Dashboard

The Productivity Dashboard offers a centralized view of key performance metrics, allowing users to optimize their workflow through visual representations of team performance and lead engagement. It tracks task completion rates and overall goal progress, empowering data-driven decisions for improved efficiency



- Centralized view of key performance metrics
- Optimize workflow through visual representations of team performance and lead engagement
- Check lead status, lead source, and lead due dates
- Track task completion rates and overall goal progress
- Empower data-driven decisions for improved efficiency



#FEATURES

Task Management

The Task Management feature is a powerful tool designed to empower users in efficiently managing follow-ups and tasks related to their leads. This feature provides comprehensive insights into lead interactions, ensuring that every lead is nurtured throughout the sales cycle

- **Efficient Task Management:** Streamline follow-ups and tasks related to leads for improved productivity
- **Enhanced Organization:** Organize tasks by priority and due dates, ensuring important follow-ups are never missed
- **Comprehensive Insights:** Gain valuable insights into lead interactions, helping users understand engagement history and preferences
- **Automated Reminders:** Set automated reminders for follow-ups to keep leads engaged and informed
- **Customizable Task Lists:** Create personalized task lists tailored to individual user needs and workflows
- **Collaboration Tools:** Facilitate collaboration among team members by assigning tasks and sharing updates on lead progress
- **Performance Tracking:** Monitor task completion rates and follow-up effectiveness to optimize sales strategies
- **User-Friendly Interface:** Enjoy an intuitive interface that makes managing tasks easy and accessible for all users



#FEATURES

Dynamic Fields & Forms

Dynamic Custom Fields and Forms allow users to create personalized fields for specific lead details and statuses. This feature enhances data collection with conditional logic in forms, streamlining the lead management process for efficient information capture

- **Custom Field Creation:** Allow users to create dynamic custom fields tailored to their specific business needs and lead management processes
- **Flexible Allocation:** Allocate custom fields to specific lead statuses, ensuring relevant information is displayed based on the current stage of the lead
- **Form Association:** Easily associate custom fields with forms, enabling users to capture essential information during lead interactions
- **Enhanced Data Capture:** Capture more relevant data points that can aid in lead qualification and nurturing
- **Dynamic Display:** Automatically update lead detail views to show relevant custom fields based on lead details, with forms allocated to specific lead statuses for streamlined data collection
- **Improved Lead Insights:** Gain deeper insights into leads by collecting customized data that aligns with business objectives



#FEATURES

User Access Control

User Role Management allows administrators to assign access levels to users, including permissions for reading, writing, updating, and deleting data. This feature provides customized menus tailored to individual roles, ensuring users have access to the necessary tools for their responsibilities

The screenshot shows the 'Edit Access Set' page in the Calsoft CRM interface. The page has a sidebar with navigation links: Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, Cms, and Reports. The main content area shows the 'Edit Access Set' page for the 'CRM' role. The page includes a 'Save' button and a table of permissions.

	READ	WRITE	UPDATE	DELETE
ACTIVITYDUE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ACTIVITYUPCOMING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BUILDER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CONTACTATTRIBUTE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CONTACTATTRIBUTESET	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CONTACTS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CRMANALYTICS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CRMAUTOMATION	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CRMREPORTS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CRMSETTING	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DEALS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
DEALSATTRIBUTE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- **Access Control:** Allocate specific access levels for each user, including permissions for reading, writing, updating, and deleting data
- **Customized Menus:** Provide tailored menus based on user roles, ensuring relevant tools and features are easily accessible
- **Role-Based Permissions:** Define permissions for different roles, enhancing security and data integrity within the system
- **Flexible User Management:** Easily modify user roles and permissions as business needs evolve



FEATURES

Lead Invoice Management

The Lead Invoice Management System streamlines the process of generating and managing invoices for leads as they convert into customers

Customers

Promotions

Newsletter

Cms

Reports

System

Medical

Crm

Hr

Working : 00:00:00 Offline

Calsoft1
today's Date : 08-02-2025

Customer Details

Name
balu vijay

Email ID
vijay24tvk@gmail.com

Address
workflows by oyo, GREETA TOWERS, Greeta Techpark, 99, Rajiv Gandhi Salai,
Industrial Estate, Perungudi, Chennai, Tamil Nadu 600096

Contact No. [†]
9876554555

Order Details

Product	Price	Quantity	GST	Amount	Action
Product	Price 0	Quantity * 0	GST 0	Amount 0.00	

Mention Gst Percent Only

Additional Details

Additional Details

Download Invoice

Print Invoice

Open Invoice

- **Customizable Invoice Templates:** Utilize pre-designed, customizable templates to create professional invoices tailored to your business needs
- **Lead-Based Invoicing:** Assign invoices to leads based on services or products they are interested in, enabling quick and relevant invoice generation
- **Tax and Discount Management:** Easily manage taxes, discounts, and other charges directly within the invoice to provide clear and transparent billing
- **Real-Time Updates:** Invoices are updated in real time, ensuring that any modifications to the lead's information or service details are reflected immediately
- **Multi-Currency Support:** Generate invoices in various currencies for international leads, accommodating global business needs



#FEATURES

Voice Notification System

Get immediate voice alerts for new leads, follow-up reminders, and changes in lead ownership. Each notification features a popup that takes you directly to the relevant lead page for swift access. Stay organized and take charge of your leads effortlessly!

The screenshot displays the Calsoft CRM interface. On the left is a sidebar with the Calsoft logo and navigation links for 'Dashboard' and 'Crm'. The main area shows a 'Lead' management page with a search bar and a table of leads. A popup window titled 'New Lead Received!' is overlaid on the table, displaying the message: 'New lead received. Please click 'OK' to view the corresponding lead.' with 'No' and 'Yes' buttons. The table has columns for LEAD ID, PRIORITY, NAME, PHONE NO, COLLEGE, STATUS, UPDATED DATE, WALK IN, FAVOURITE, and ACTION. The status column contains buttons like 'Pending', 'intreste', and 'completed'. The bottom of the table shows 'Items per page: 10' and '1 - 4 of 4'.

LEAD ID	PRIORITY	NAME	PHONE NO	COLLEGE	STATUS	UPDATED DATE	WALK IN	FAVOURITE	ACTION
400	M	jai	987456321		Pending	Feb 8, 2025, 1...			...
267	M	Prathaa	638313721		intreste	Feb 8, 2025, 1...			...
399	M	Sample	13244432532...		completed	Feb 8, 2025, 1...			...
236	M	Balu	9791142679		completed	Feb 8, 2025, 1...			...

- **Instant Voice Alerts:** Receive voice notifications whenever a new lead is generated or a follow-up reminder is set
- **Lead Owner Change Notifications:** Get immediate voice alerts when there is a change in lead ownership
- **Interactive Pop-ups:** Each notification comes with an interactive pop-up that provides key details about the lead
- **Direct Navigation:** The pop-up allows you to navigate directly to the specific lead page for quick access and management
- **Stay Informed:** Ensure you never miss important updates on your leads with timely voice alerts and notifications
- **User-Friendly Experience:** Enjoy a seamless user experience with a combination of voice notifications and pop-up alerts



#FEATURES

Lead Ownership Visibility

Allow users to view lead ownership details, displaying the team member currently assigned to each lead. Users can easily check allocations and contact assigned members for clarification, promoting transparency and collaboration within the team

Lead ID	PRIORITY	Lead Name	Lead Phone Number	Product Name	Lead Status	Lead Owner Mail
401	M	Balu	9791142679		completed	ramu@gmail.com
398	M	Sri Sakthi Organics	+919790590929		Pending	navin@gmail.com
236	M	balu vijay	9790202384		completed	fast@gmail.com
400	M	test v	09791142673		Pending	fast@gmail.com
267	M	test v	09791142679		Pending	
399	M	Arin	9159097944	Welcome Call		nk@nmail.com

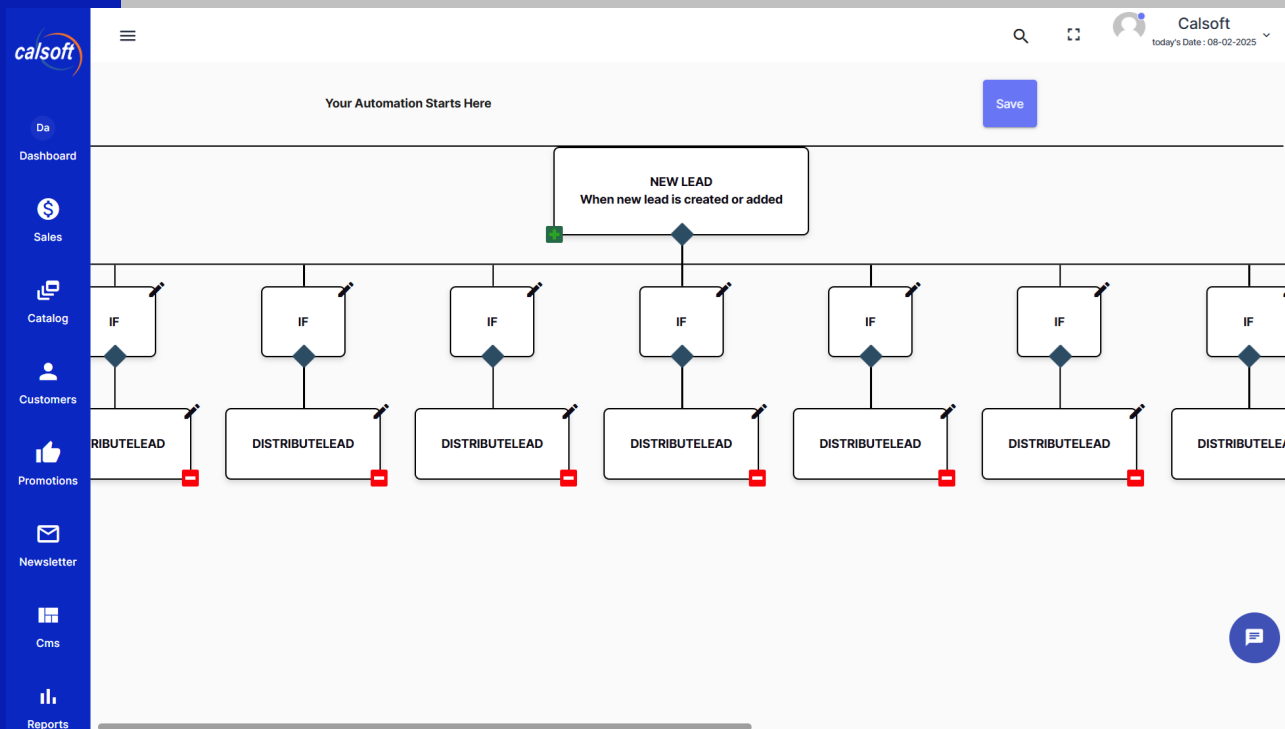
- **Quick Ownership Lookup:** Users can instantly check which team member is assigned to a specific lead, ensuring transparency within the CRM
- **Contact Assigned User:** Provides an option for users to directly contact the assigned team member if they have any questions or require further information about the lead
- **Clear Allocation Status:** Displays the allocation status of each lead, such as "Unassigned," "Pending Assignment," or the name of the assigned team member
- **Search and Filter Functionality:** Users can search for leads and filter results based on assigned team members to quickly locate and verify ownership



#FEATURES

Lead Assignment System

Allow users to view lead ownership details, displaying the team member currently assigned to each lead. Users can easily check allocations and contact assigned members for clarification, promoting transparency and collaboration within the team



- Automated Lead Distribution: New leads are automatically assigned to team members, ensuring efficient workload management
- Round Robin Assignment: Leads are distributed evenly among team members through a round-robin method, adhering to predefined conditions
- Conditional Assignment: Leads can be assigned based on specific criteria, including:
 - Skill set or expertise
 - Geographical location
 - Customizable Rules
 - Campaign-Based Distribution
- Equal Opportunity for All: This approach guarantees that all team members have equal opportunities to engage with new leads, promoting fairness and balance within the team
- Real-Time Updates: Team members receive instant notifications of newly assigned leads, keeping everyone informed and responsive



FEATURES

Lead Scoring System

Track and prioritize high-value leads by assigning points based on their activity, engagement, and call duration. Automatically score leads based on interactions like calls, status changes, and follow-ups. Focus on the most promising prospects with real-time updates and customizable scoring rules, seamlessly integrated within the CRM.

NAME	STATUS	POINTS	ACTION
Test Scoring	Active	15	...
due	Active	50	...
Sales team	Active	30	...
affiliate	Active	12	...

Items per page: 10 1 - 4 of 4 |< < > >|

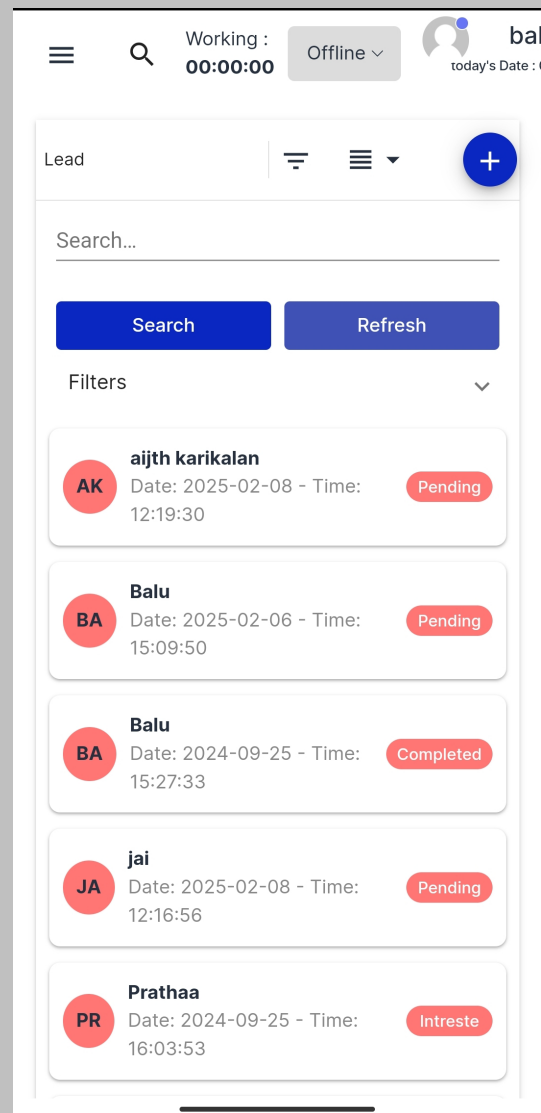
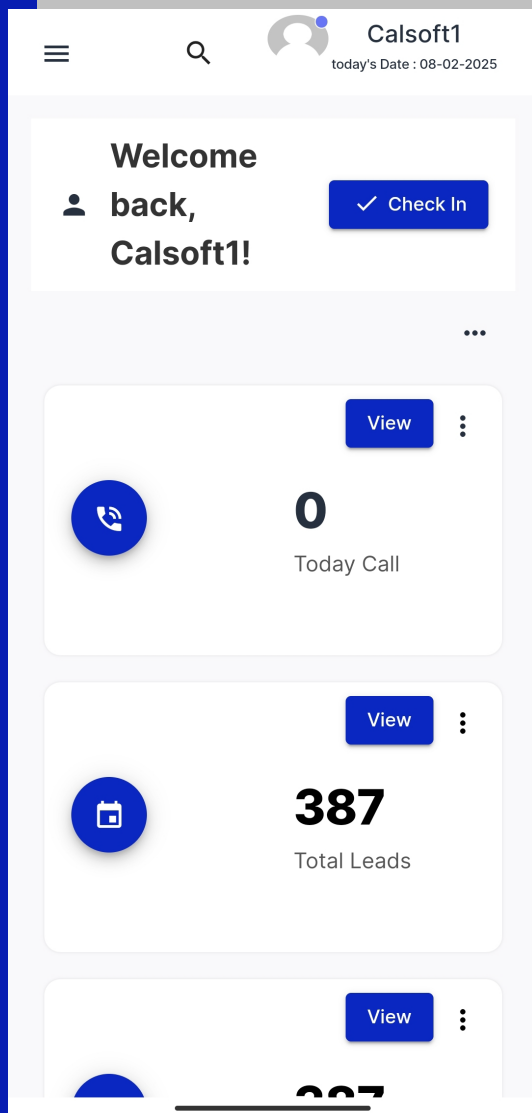
- Activity-Based Scoring – Automatically assign points based on email opens, calls, meetings, and other interactions.
- Time-Based Evaluation – Allocate points based on the duration of lead engagement to ensure timely follow-ups.
- Automated Lead Prioritization – Focus on the most promising leads with a dynamic scoring system.
- Customizable Scoring Rules – Define and adjust scoring criteria to align with your sales strategy.
- Real-Time Score Updates – Lead scores update dynamically as interactions occur for accurate tracking.
- Seamless CRM Integration – Fully built into the CRM for effortless lead management and improved conversions.



#FEATURES

Mobile App

We offer a mobile app that provides a seamless experience for managing leads, enabling users to communicate effectively and collaborate efficiently, all from the palm of their hand



- An easy-to-use Mobile CRM makes it convenient for sales teams to stay updated regardless of where they may be
- Available for Android and IOS



Integrations





Realize Your Ideas

Thank You

We're grateful for the opportunity
to support your business

Get In Touch With Us

+91 94448 60882

admin@dspeedup.com

www.calsoftgroup.com