calsoft

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

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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

AIRWATER

ReechPharma - Formulations & Drug Delivery -

Mark Care

vGrowFarms

Pure, Fresh & Healthy Milli Se Tripti Food Items

CLINEVO Technologies

RYUK LABS

INBAM HOSPITAL

Sadham Solutions

ibadbay DRIVE YOUR DREAM

dSPEEDUP

Nutraphytos Natural Product Store

GOAN BOAT TOUR EXPLORE THE OCEANS WITH STYLE AND SAFETY

Green Shakti

HALA MEAT

Webotel HOTEL E-FRANCHISE

Aarogiyam NATURAL HEALTH CARE PRODUCTS

Infinity

Chemist And Druggist Quality

I Am Pet

CH MILANO Café & Restaurant

KCI Kovai Classic Industries An ISO 9001:2015 Certified Company

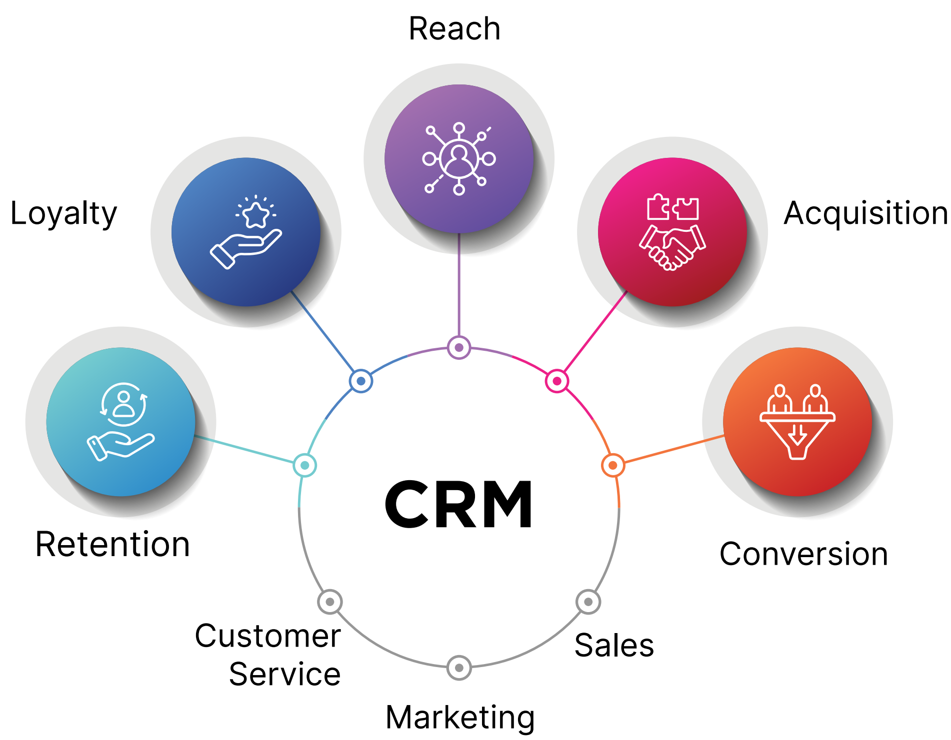
Ready Made CRM For Your Industry

- B2B
- Real Estate
- Education
- Finance
- Healthcare
- Travel
- Hospitality
- Other B2C
- Saas

Manage Leads and Accounts

Without Any Hassle

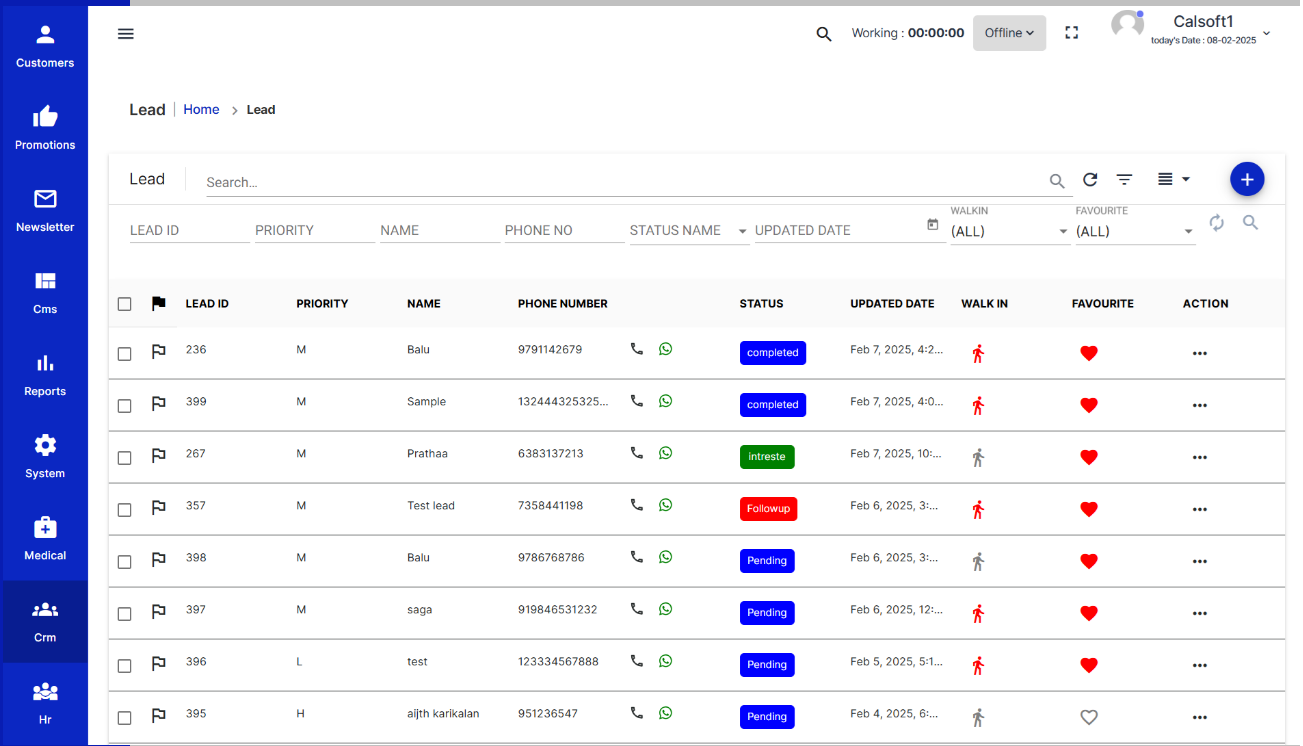
No more information discrepancies. Get one view of leads for all



#FEATURES

Lead Management System

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

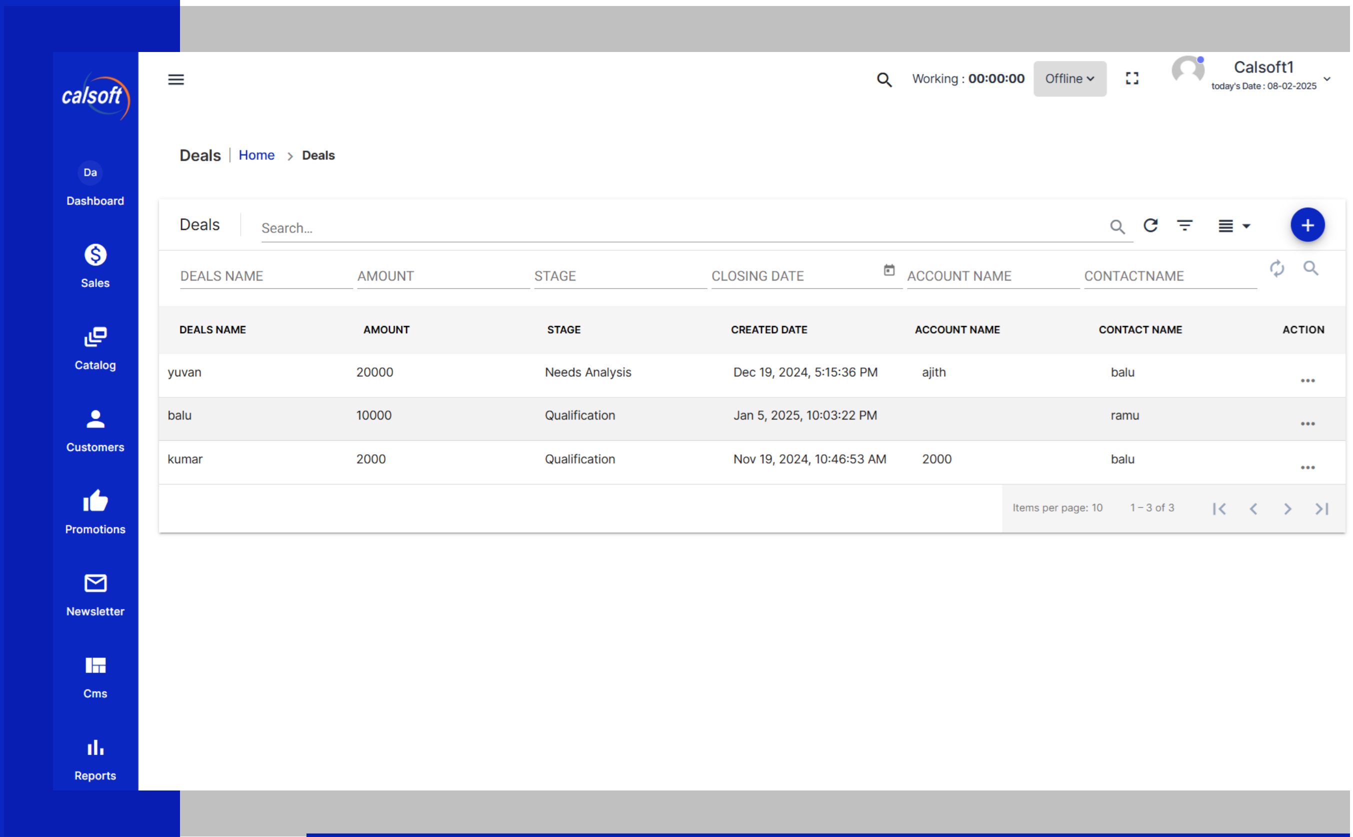


- Capture leads using lead capture forms and from 3rd party apps
- Bulk import leads
- Assign leads automatically to the right sales rep using Calsoft Routing Engine
- Manage your leads: analyze them by source, owner, 'created at' and 'updated at'
- Multiple 'Custom Fields' and 'Smart Filters' on Leads
- 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

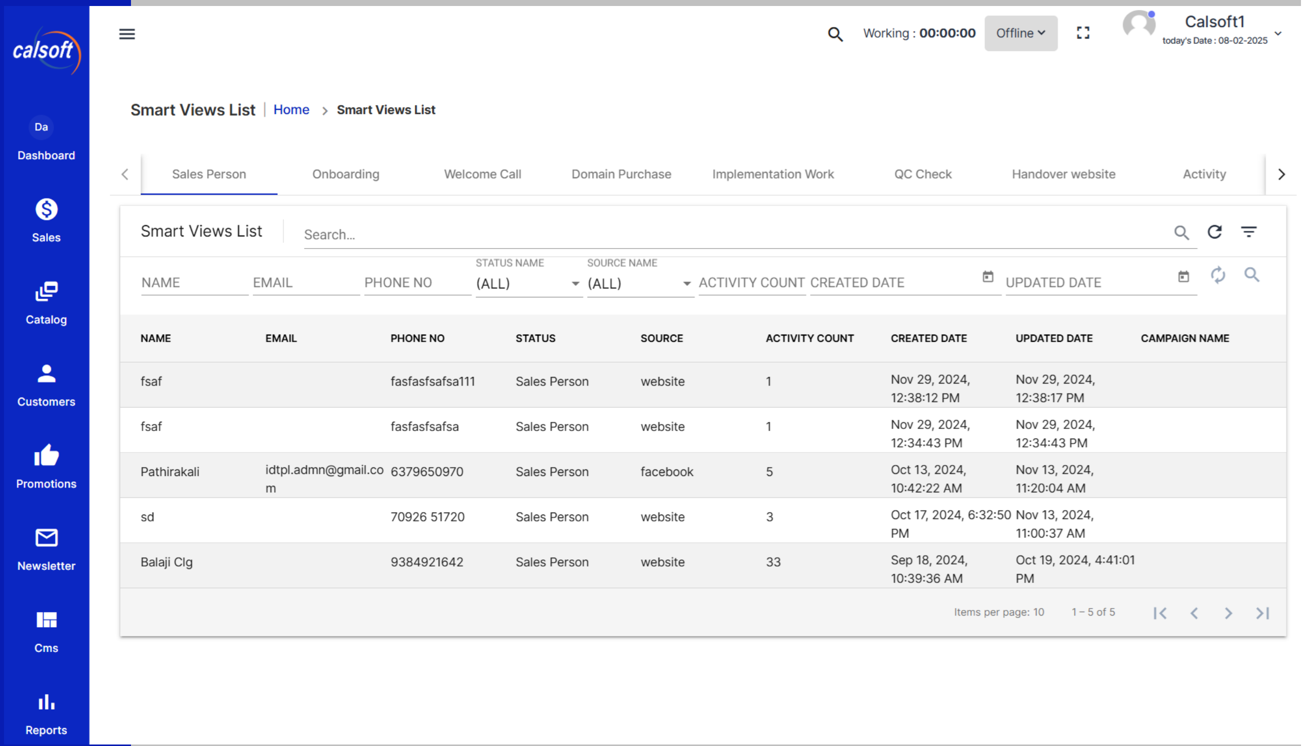


- Get insights on deals, their value and estimated closure date
- Use smart filters for sharper analysis on deals
- Understand which rep is closing deals faster
- Nurture client for multiple sales products
- Share deal information within the team for better collaboration
- Monitor multiple deals for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

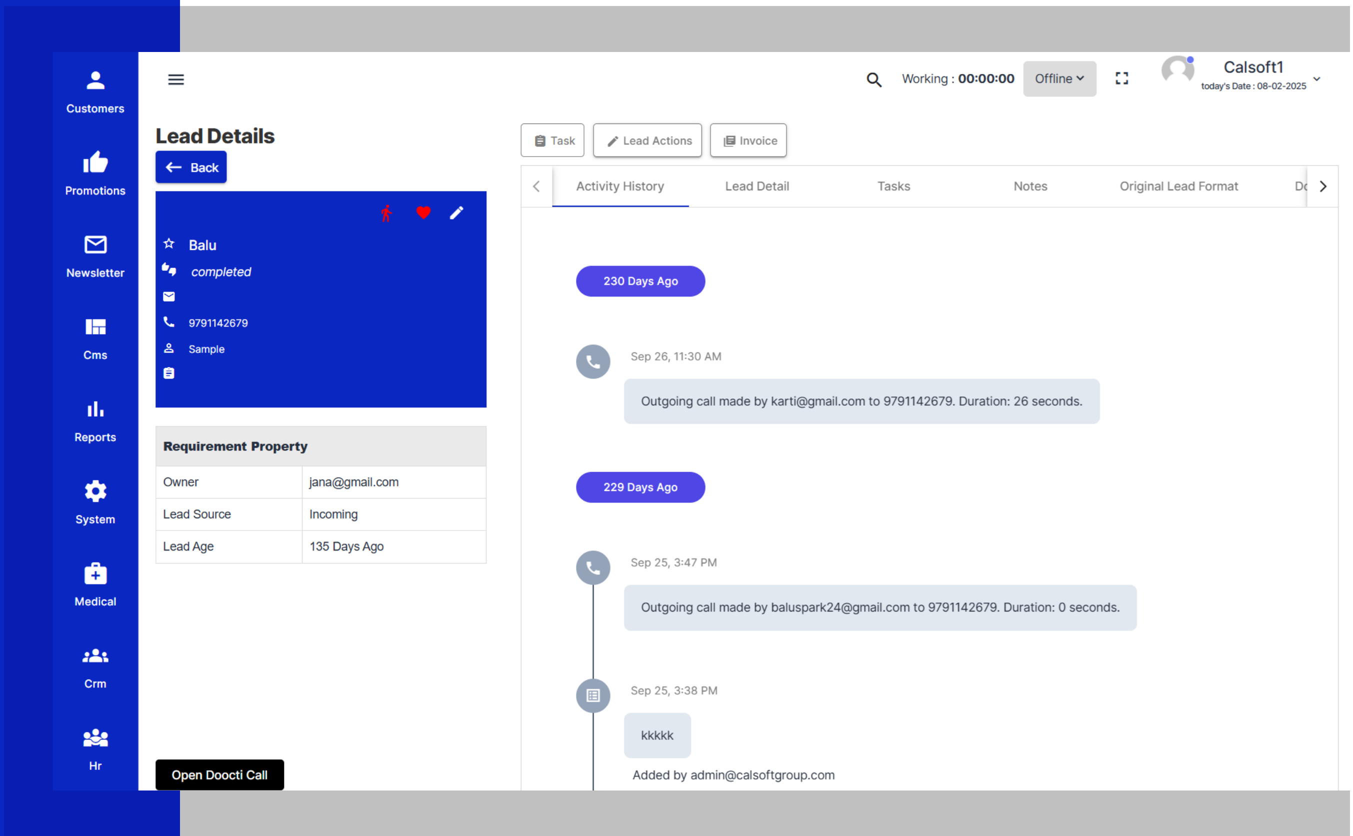


- Customizable Layout: Personalize the display to show relevant lead information
- Filter Options: Filter leads by criteria like status, source, and date
- Segmentation: Organize leads into categories for targeted marketing and sales efforts
- Real-time Updates: Access the latest information on lead 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

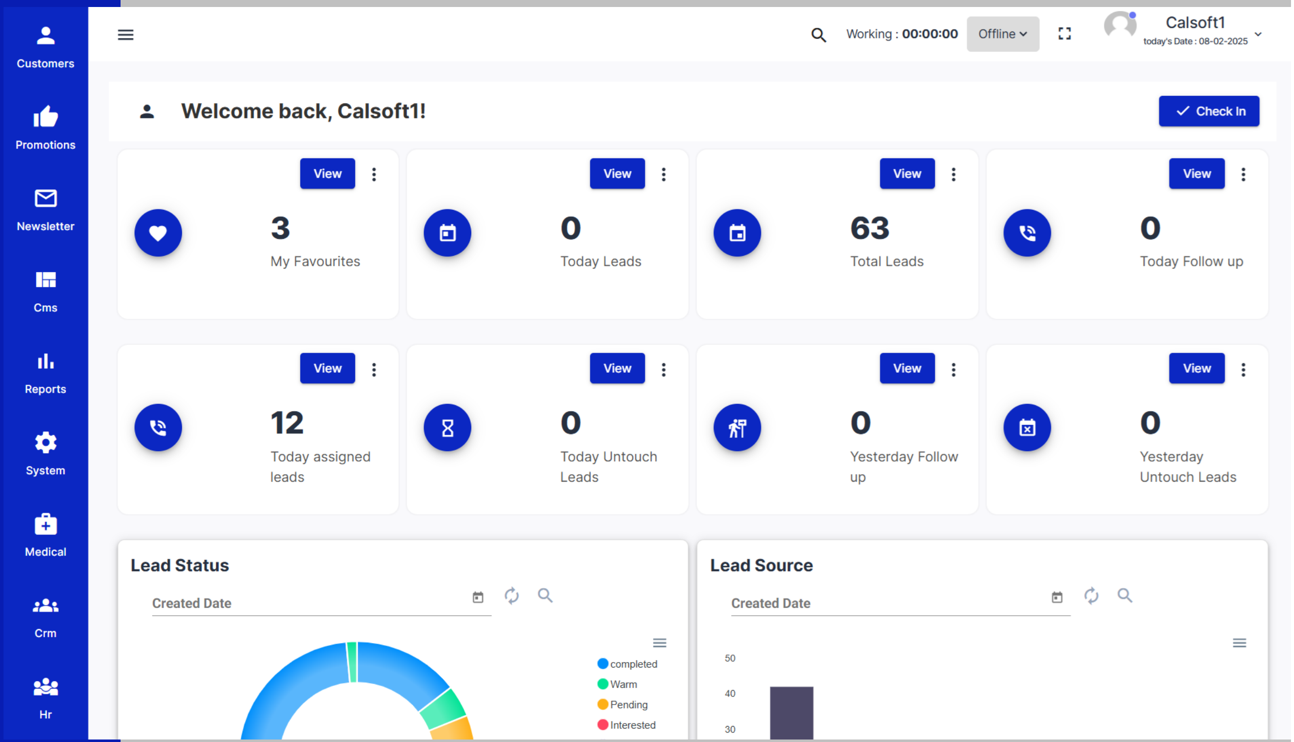


- Import or migrate data from other crms or excel
- Export the data within a few clicks
- Bulk update data with a few clicks- leads, deals and tasks
- Sync calsoftcrm with 3rd party apps using webhooks and Apis
- Prevent duplication of data
- Access right data effortlessly with the help of filters
-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

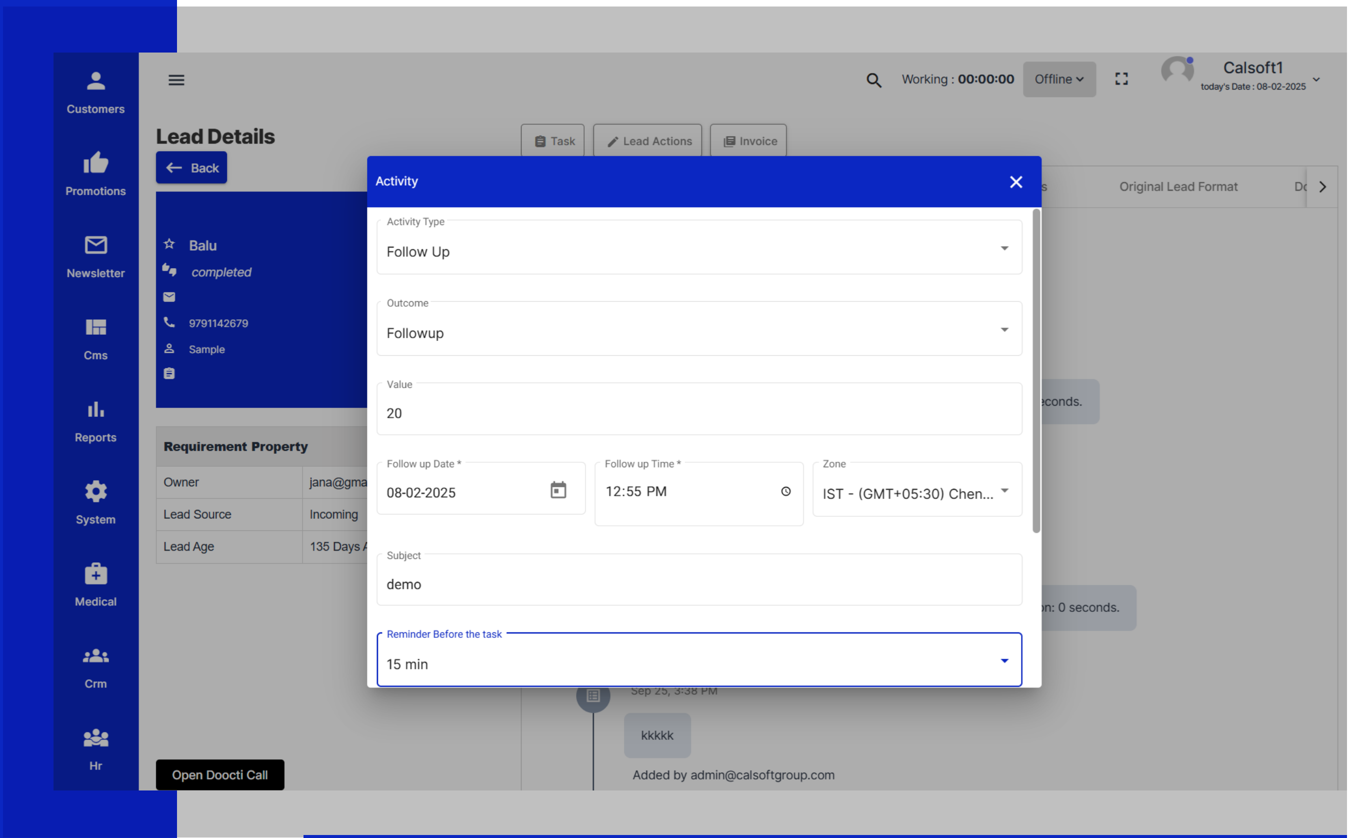


- Centralized view of key performance metrics
- Optimize workflow through visual representations of team performance and lead engagement
- Check lead status, lead source, and lead due dates
- Track task completion rates and overall goal progress
- Empower data-driven decisions for improved efficiency

#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

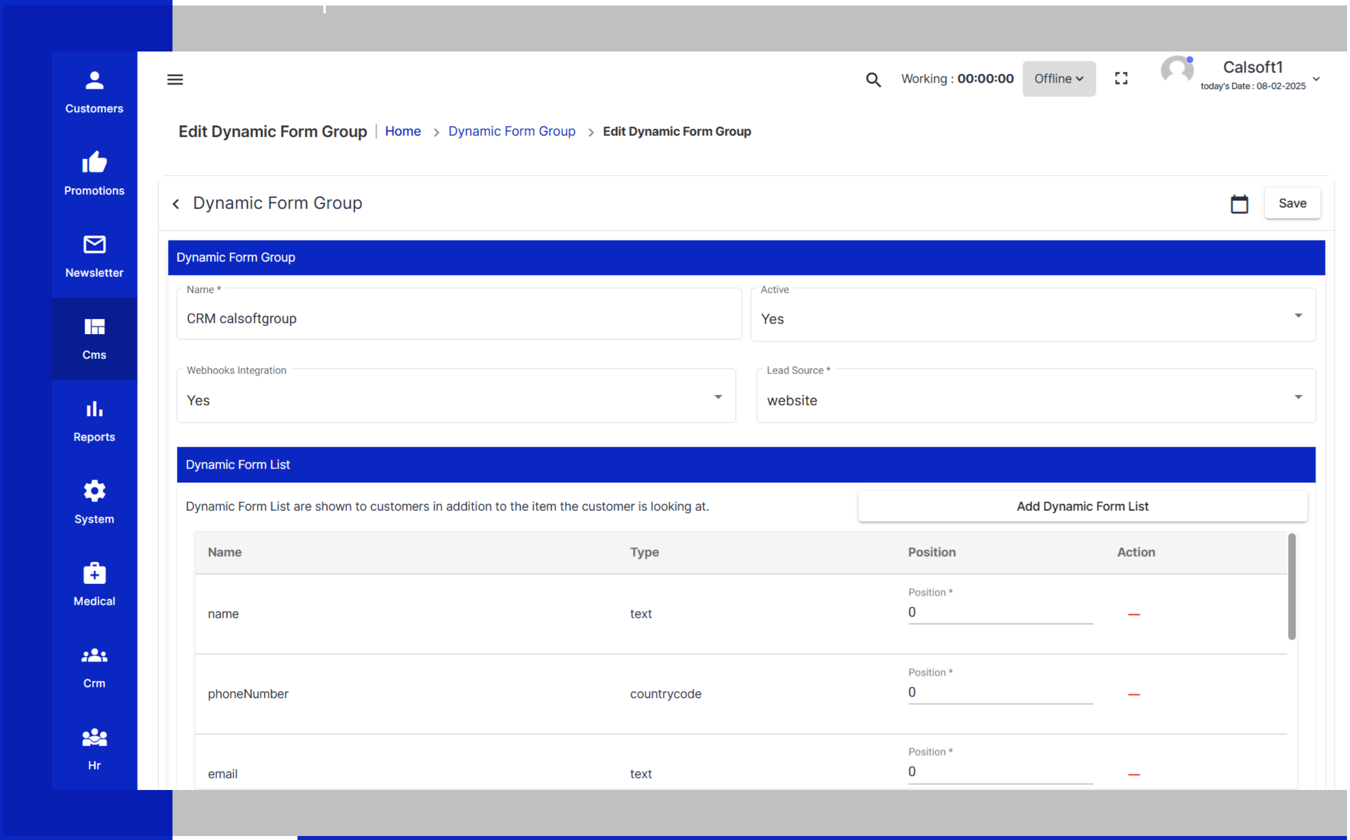


- Efficient Task Management: Streamline follow-ups and tasks related to leads for improved productivity
- Enhanced Organization: Organize tasks by priority and due dates, ensuring important follow-ups are never missed
- Comprehensive Insights: Gain valuable insights into lead interactions, helping users 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

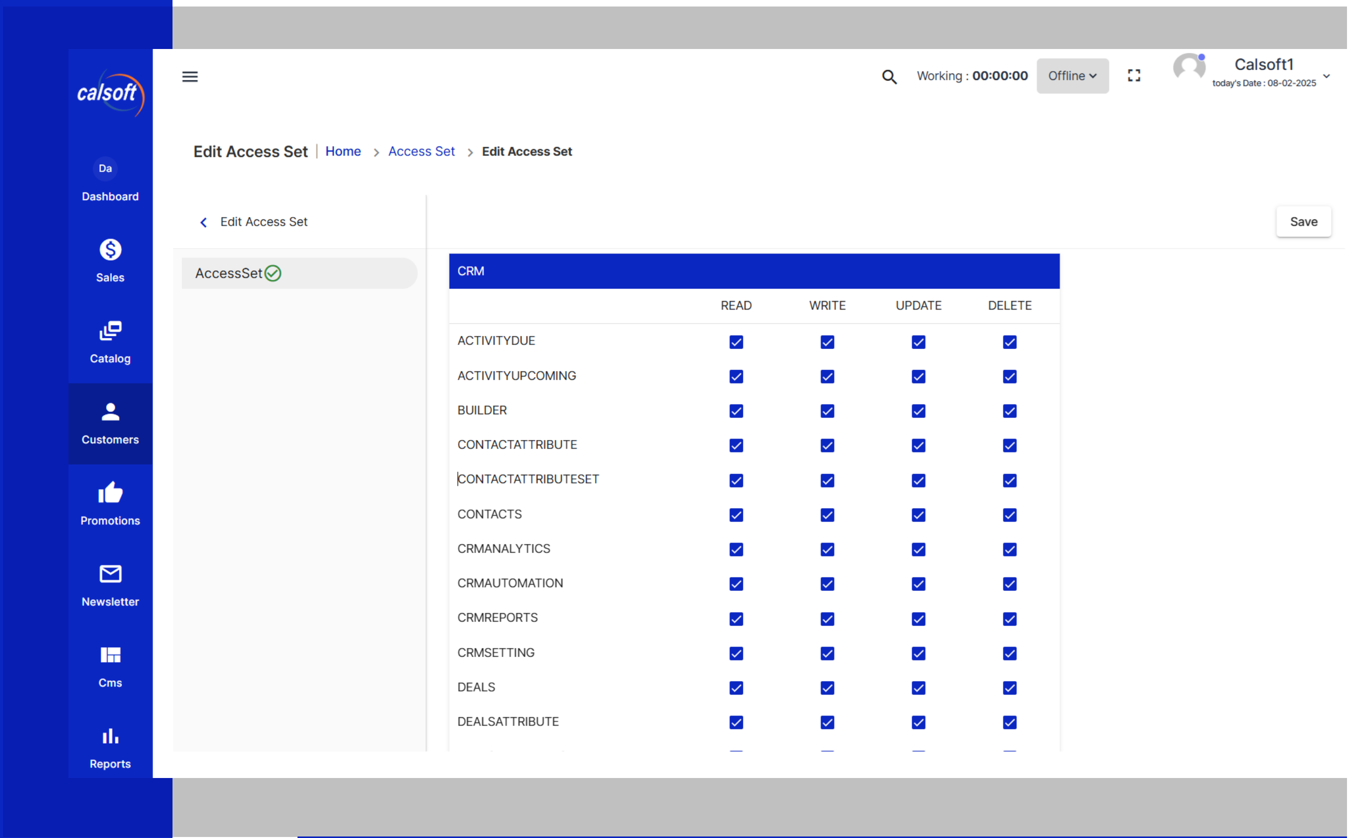


- Custom Field Creation: Allow users to create dynamic custom fields tailored to their specific business needs and lead management processes
- Flexible Allocation: Allocate custom fields to specific lead statuses, ensuring relevant information is displayed based on the current stage of the lead
- Form 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

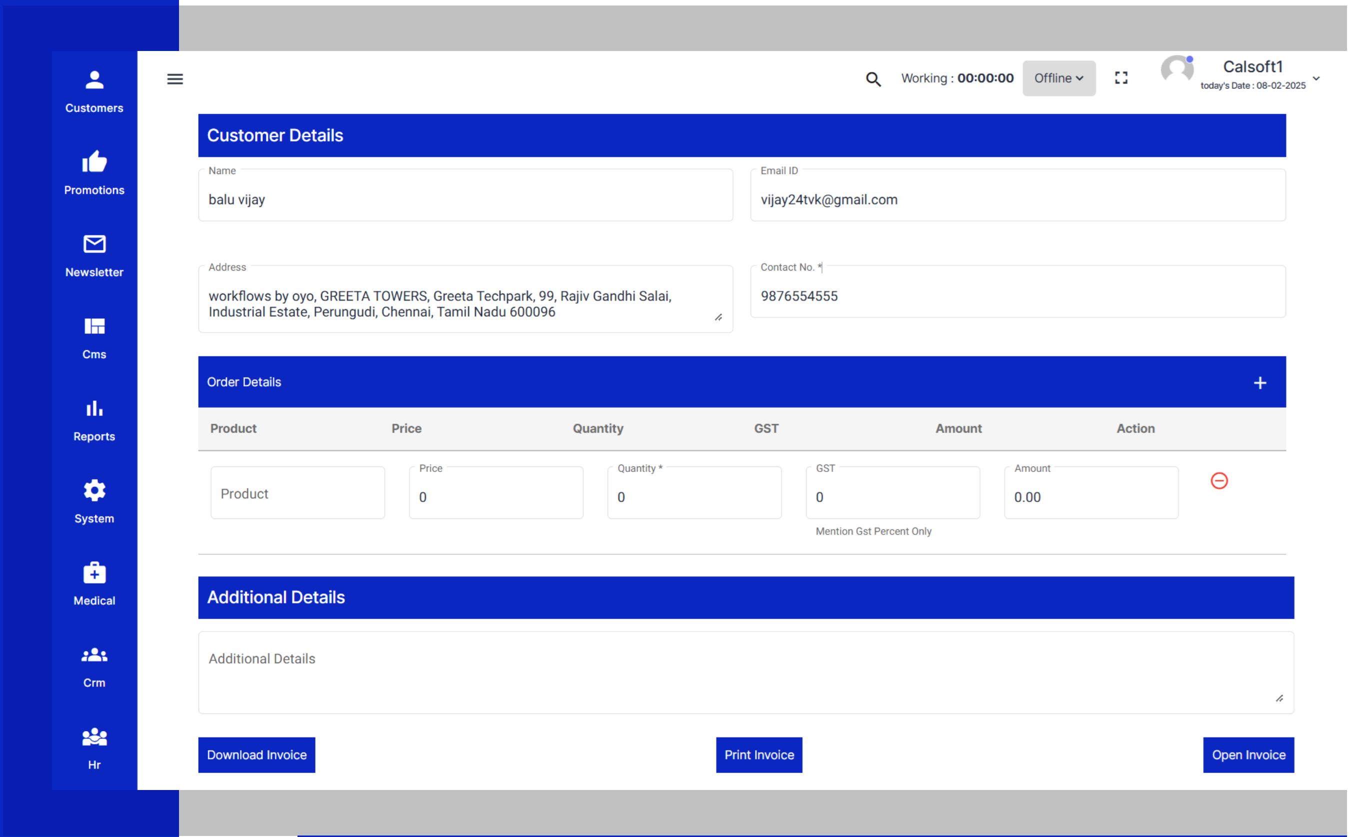


- Access Control: Allocate specific access levels for each user, including permissions for reading, writing, updating, and deleting data
- Customized Menus: Provide tailored menus based on user roles, ensuring relevant tools and features are easily accessible
- Role-Based Permissions: Define permissions 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

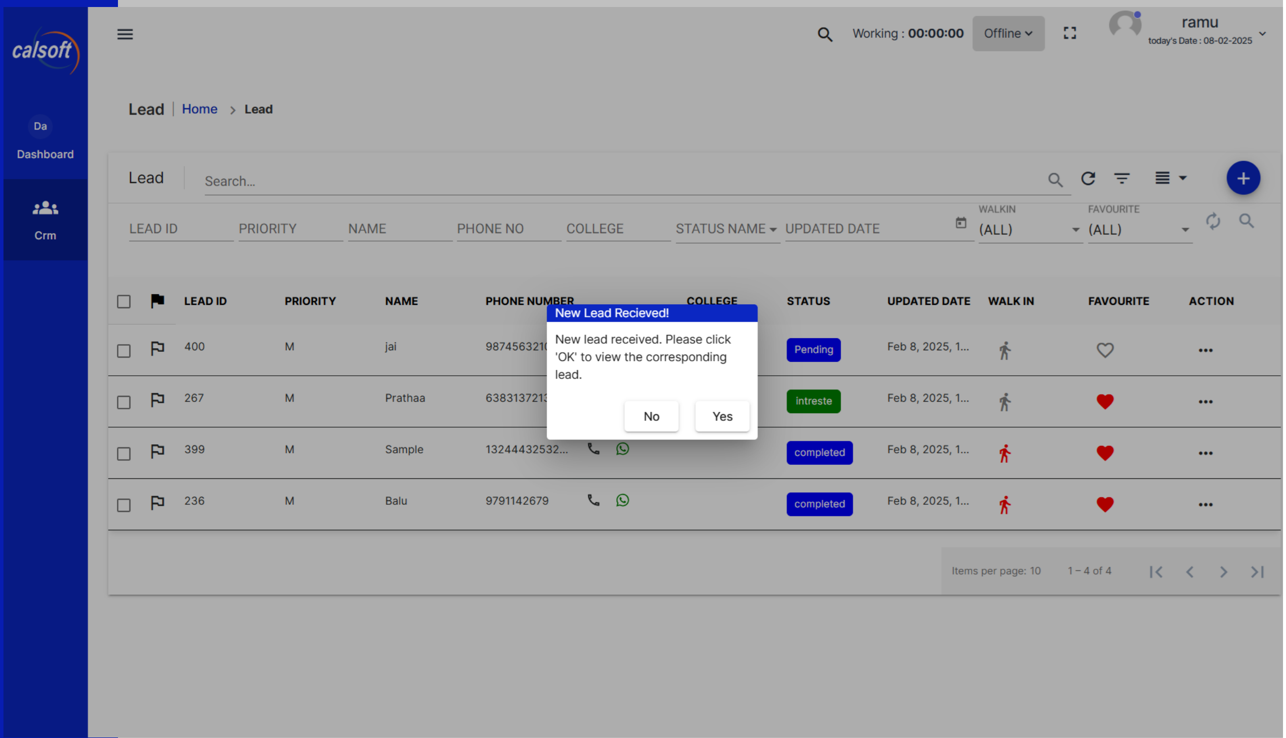


- Customizable Invoice Templates: Utilize pre-designed, customizable templates to create professional invoices tailored to your business needs
- Lead-Based Invoicing: Assign invoices to leads based on services or products they are interested in, enabling quick and relevant invoice generation
- Tax and 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!

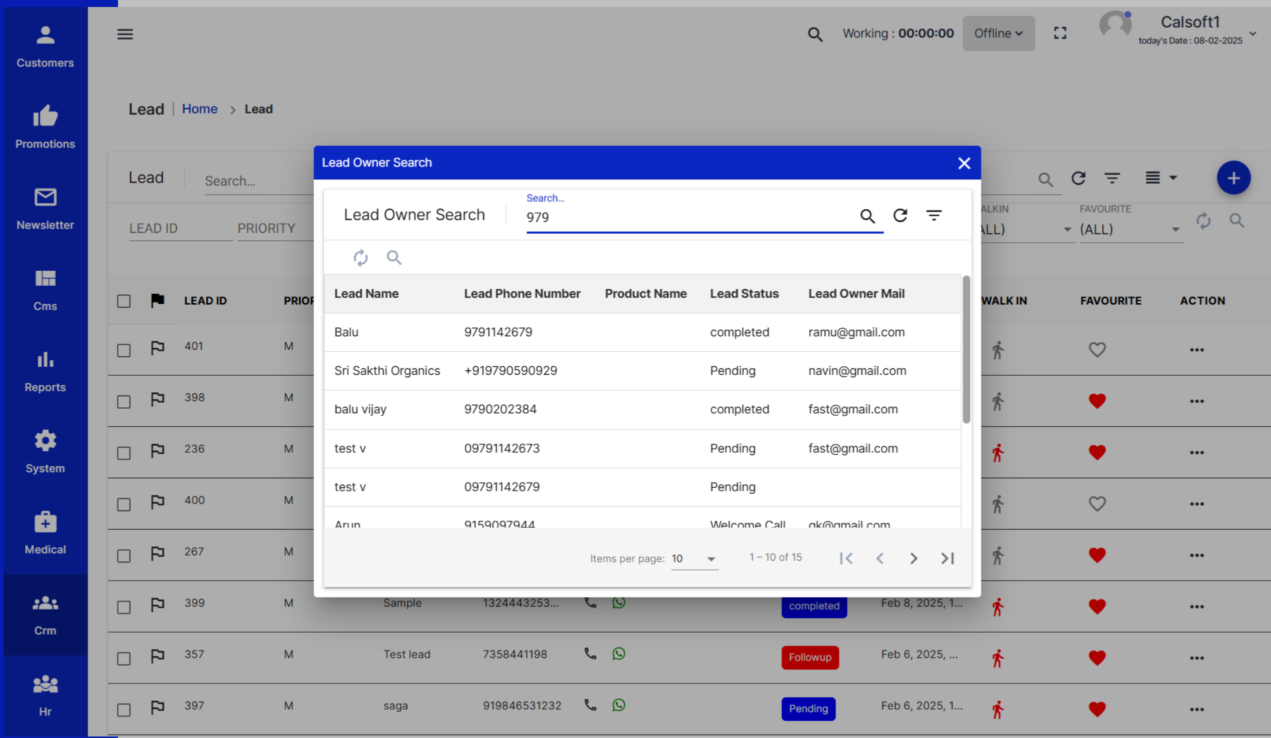


- Instant Voice Alerts: Receive voice notifications whenever a new lead is generated or a follow-up reminder is set
- Lead Owner Change Notifications: Get immediate voice alerts when there is a change in lead ownership
- Interactive Pop-ups: Each notification comes with an interactive pop-up that provides 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

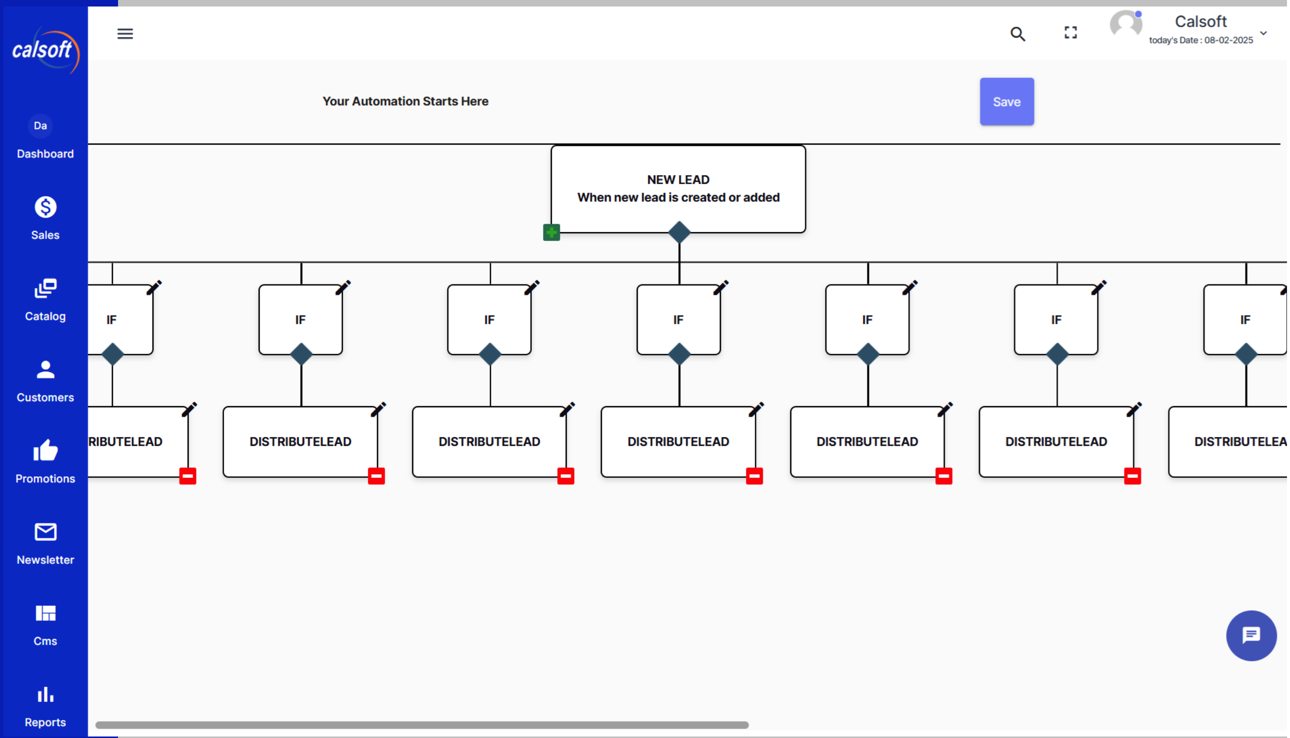


- Quick Ownership Lookup: Users can instantly check which team member is assigned to a specific lead, ensuring transparency within the CRM
- Contact Assigned User: Provides an option for users to directly contact the assigned team member if they have any questions or require further information about 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

F E A T U R E S

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:

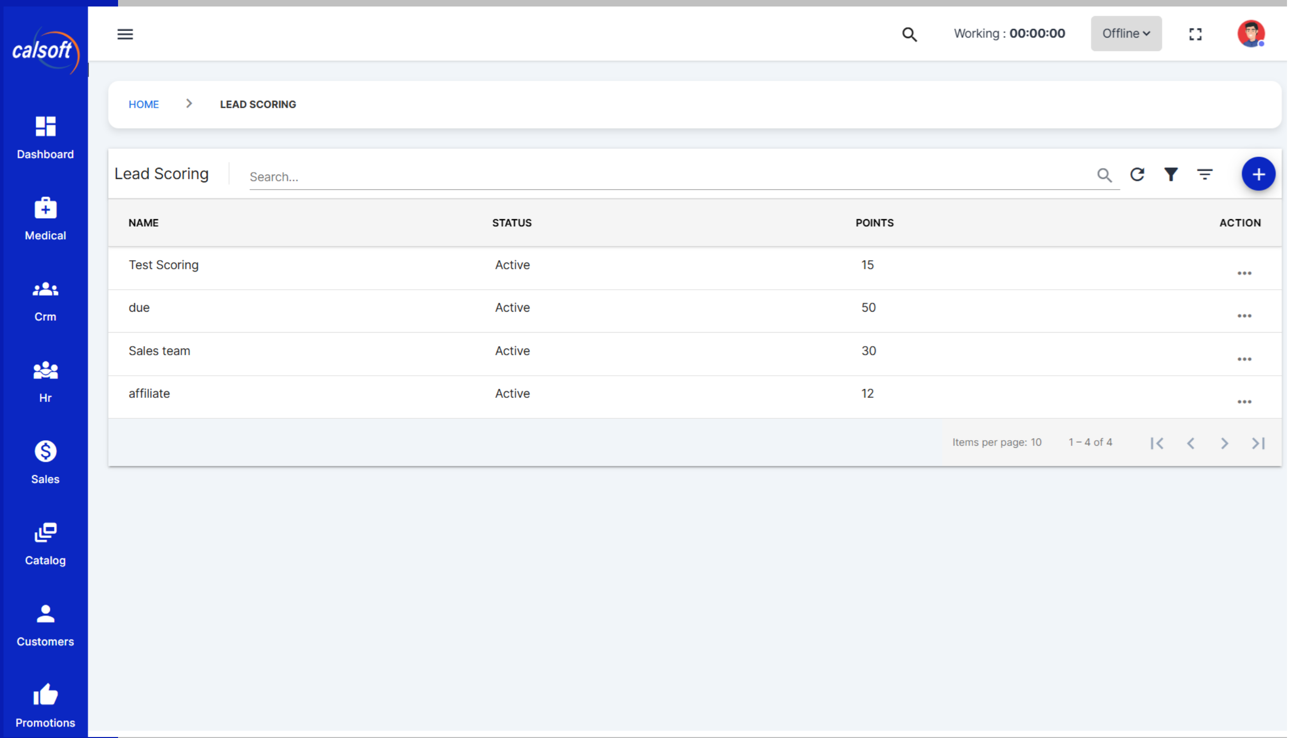
→ Skill set or expertise
→ Geographical location
→ Customizable Rules
→ Campaign-Based Distribution

- 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

F E A T U R E S

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.

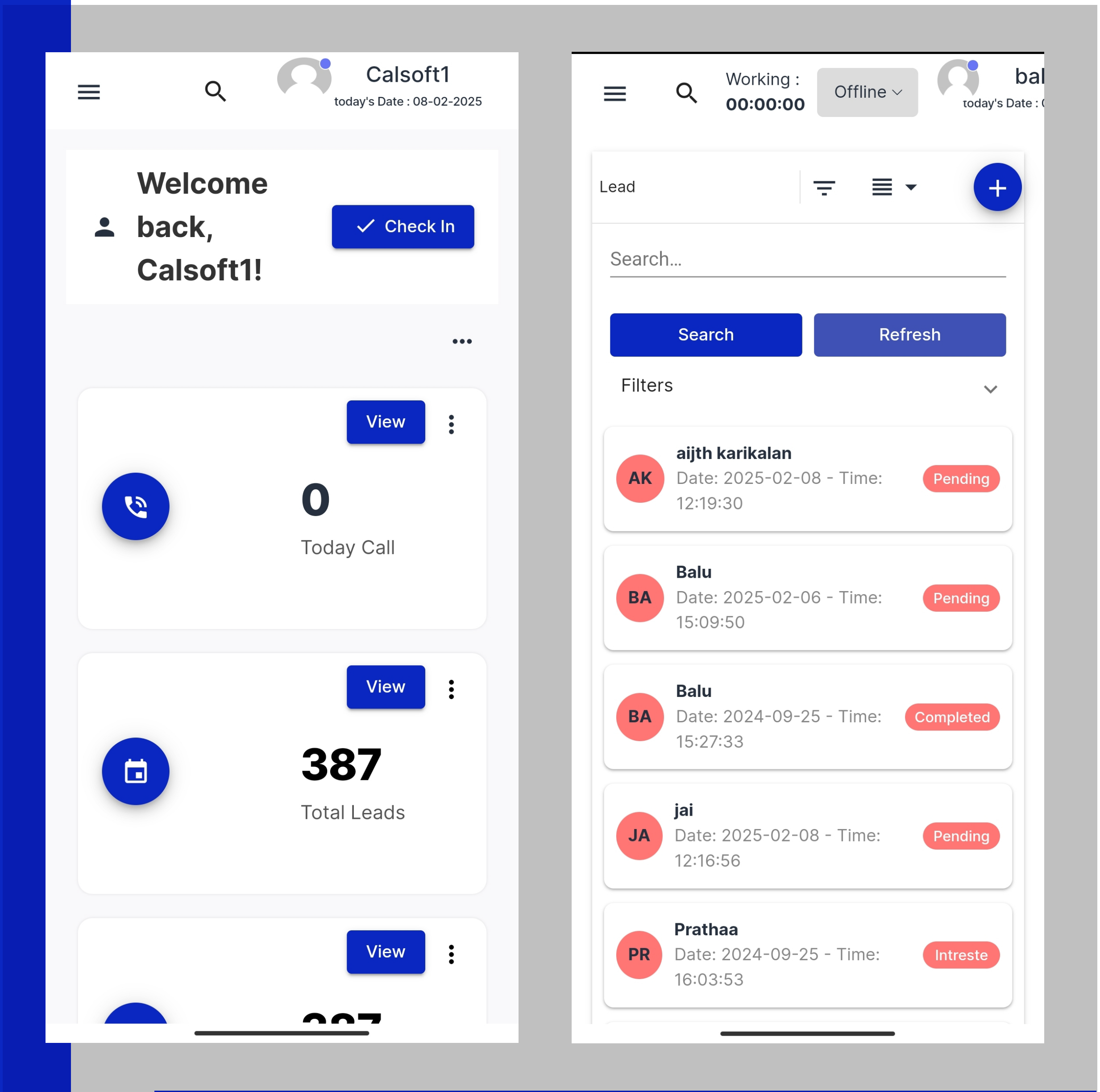


- Activity-Based Scoring – Automatically assign points based on email opens, calls, meetings, and other interactions.
- Time-Based Evaluation – Allocate points based on the duration of lead engagement to ensure timely follow-ups.
- Automated Lead Prioritization – Focus on the most promising leads with 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

dSPEEDUp	knowlarity	Facebook
Google Ads	commonfloor.com	Contact Form
Justdial	magicbricks.com	Sulekha
Website	WhatsApp message	Google Forms
doocti	indiamart Source > Supply > Grow	Phone
Callyzer	exotel	WhatsApp
WiX	WordPress	Razorpay
PayUmoney	HOUSING.com	PhonePe
stripe	CCAvenue®	Easebuzz
webhooks	Gemini	

Realize Your Ideas

Thank You

We're grateful for the opportunity
to support your business

Get In Touch With Us

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