



GOLDEN EAGLE
IT TECHNOLOGIES PVT LTD

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CRM



FEATURES WITH DESCRIPTION :

- **User Management**
User Types - 1) Admin 2) Employee 3) Client
All basic operations for users like: Edit/View Profile, reset passwords, Register new employees and clients
There is now signup for end user, only admin can register a user.
- **Browser calling with twilio**
For browser calling we have used twilio(cloud communication platform), basically it used to call on prospects and convince them to convert as a lead and fix an appointment with client.
- **Prospects Management**
Prospects are the raw data on which employees do call.
- **Campaigns**
Campaigns are a group of prospects, we apply filters on campaigns on behalf of locations, counties, states, cities, radius, SIC code, Renewal dates etc. In result we have a number of prospects on which employees used to calls. Generally one employee works on a single campaign at a time
- **Manage large data of prospects with a search engine for convenient flow**
There is a large number of prospects and we use SOLR search engine to apply filter which we have in campaign.
- **Leads Management**
Leads are the converted prospects who are interested in your business and want an appointment with the client.

- **Schedule Appointments**

Appointments are scheduled when lead is generated, when appointment is generated a email notifications will be fired to the client, prospect and admin regarding the appointment date and time. As well as a block will be created on your calendar for that particular duration. Appointment cannot be scheduled if any other appointment or any block is already there.

- **Calendar feature**

All the appointments, blocks, holidays will be see here in a calendar views. Client can add there blocks in calendar

- **Integrate Google and Outlook calendar**

Client can integrate their google or outlook calendar in the application so the CRM calendar will be synced with the client's calendar and all the appointments and blocks will be synced.

- **Block dates and slots to not have appointments**

Select date, days and time for blocks, like if you are as a client not available on any time, you just add the block on the calendar and there will be no appointment at that slot.

- **On screen Dial pad**

With calling from prospects calling pages employee and admin will have an option of dial pad. It is available on every page of application

- **CSV import and export for Prospects, Leads, Employees, Clients**

CSV import and export for bulk upload of data. It is available for Prospects, Leads, Employees and Clients

- **Call-back schedule**

If any prospect wants to schedule a call-back, there is an option to schedule it on given date and time. It will be highlighted automatically on the same date time. An employee can assign the call-back to any other employee as well.

- **Dynamic call result disposition**

Call result dispositions are the call results, what result employee found on the call with prospect. Following are the example

- 1) Not Interested
 - 2) Do Not Disturb
 - 3) Appointment Scheduled
 - 4) Call-back scheduled
- etc.

Admin can add this as many as he needs.

- **Invoices management**

Invoices for clients on per leads and appointments basis, depends admin wants to generate it.

- **Reports**

Filters - 1) Today 2) Current Week 3) Week 4) Month 5) Last Month 6) Custom date range 7) Employees

Employee Reports - Track how much time an employee is active on the application and calculate the idle time.

Call history reports - All the calls will be tracked here with the call duration and other info

Campaign reports - All the reports regarding the campaigns, it will have a campaign filters

- **SMS and Email notifications**

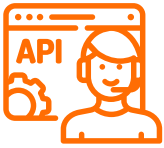
Email notifications on all major operations performing

SMS notification on all major operations performing using Twilio (Additional charges will be there for client)



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THIRD PARTY APPS USED :

- Twilio (Cloud communication platform)
- Outlook (Calendars Sync API)
- Google (Calendars Sync API)



NAVIGATION :

Admin Panel

- Dashboard
- Campaign
 - Campaign list
 - New campaign
- Leads
 - Lead list
 - New Lead
 - Upload Leads
- Appointments
 - Appointments list
 - New appointment
 - Calendar
- Call Backs



- **Reports**
 - User report
 - Call History report
 - Campaign report
 - Current online user
- **Prospects**
 - Prospect list
 - New prospects
 - Upload prospects
- **Employees**
 - Employee list
 - Add employee
 - Upload employees
- **Client**
 - Client list
 - Add client
 - Upload client
- **Client Panel**
- Dashboard
- Lead list
- Appointment list
- Calendar
- Invoices
- **Employee Panel**
- Dashboard
- Campaign
- Leads
 - Lead list
 - New Lead



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- **Appointment**
 - Appointment list
 - New appointment
- **Call-back**
- **Reports**
 - User reports
 - Call history reports
 - Campaign reports