



CRM for BUILDERS

The perfect solution for a builder or building services company to manage your workers, your clients and your projects

Clients

- Client profiling
- Customise client dropdown fields
- Client fields you can customise
- Number of clients in your database
- Client Texting
- Client Emailing

Appointments

- Schedule future appointments
- Record past appointments
- Schedule appointments for colleagues
- Reminder to clients about appointments
- Reminder to staff about appointments
- Recurring appointment scheduling
- Appointment & Activity tracking
- Activity reporting
- Outstanding activities on dashboard
- Integrated Diary
- Bulk assigning of appointments

Sales Marketing

- Filter your clients for campaigns
- Mailshot by email or SMS
- Schedule follow ups
- Integration with Mailchimp for tailored emailshots
- Set up email signatures for each user
- Pipeline Management
- Top 50 clients by turnover
- Analyse lost business
- Conversion rate report
- Pipeline calendar report
- Flag sales as Invoiced and Paid

Reporting

- Client Report generator
- Analytics reporting
- Staff Activity reporting
- Report on Tasks and Activities
- Analyse by client type and appointment type
- Communication reporting
- Report output to Excel
- Report output to PDF
- Download all reports to excel

User Functionality

- Restrict staff to see their own clients only
- Restrict staff to see their own diary only
- Role permissions
- Task & Activity tracking

Communication

- SMS facility available
- Email individual client
- Bulk email clients
- Text individual client
- Bulk text clients
- Schedule automatic reminder to clients for appointment
- Communication reporting
- Email integration - automatic link with Outlook
- Full history of communication with clients

Document Storage

- Upload templates and policies
- Upload documents for clients
- Upload links to dropbox & YouTube etc.

Administration

- Full audit trail helping with compliance
- Access archived content
- Manage your users
- Assign role permissions
- Import clients

User Permissions

- Permission to merge clients
- Permission to view Reporting
- Permission to view own and colleagues diaries
- Permission to bulk edit clients
- Permission to view own and colleagues clients

Support

- On screen Support
- Email Support
- Phone Support
- Access to instructional videos

Training

- Set up training
- User Training
- Administrator training
- Online one to one training
- Webinar training
- Classroom training
- Train the trainer

Data Management

- Merge Client facility
- Bulk data updater
- Pre import cleansing of your data
- Initial transfer of your existing data
- Data Management work
- Fixed Client import facility

Integration

- Integration with Microsoft Excel
- Output to PDF
- Integration with Outlook
- Integration with Mailchimp
- Output to Hotsoft Hotel software
- Links to Google Maps to find clients

Navigation

- Quick search from every screen
- User dashboard
- Tailored for PC, Laptop, Tablet and Smartphone

Invoicing & Payments

- Add in Invoices for clients
- Bulk assign invoices for courses for example
- Automatic weekly or monthly set amount invoicing
- Record Payments for clients
- Customise Payment types and methods
- Invoice & Payment reporting

Online Payments


- Integration with Stripe
- Take online payments from your clients
- Let your clients pay their bills online

Stock Management

- Supplier and stock item management
- Set up your own stock categories
- Reorder Levels and Reorder quantities
- Search by category and stock item
- Order stock and receive stock
- Email orders to suppliers

- Report on stock running low
- Assign stock using barcode scanning
- Stock Level Report
- Stock Movement report
- Stock Financial report

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