



CRM for REPAIRS

When it comes to running your repair centre and managing your servicing we can help you with a tried and tested solution that will run your company more efficiently and provide better service to your customers

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

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
- Automatic reminder for client appointments
- 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

Repairs

Book in repair facility
Till receipt for customer
Repair status checker for client
Integrated Parts management
Record work done and current status
Record testing in and testing out on repair
Comprehensive reporting on repairs
Show outstanding repairs
Show duration report
Automatic reminder sent to client when repaired

Field Service

Job Scheduler
Record time, labour & materials
Set hourly rates for employees
Set your own job types
Produce timesheets of work done by employees
Produce report of work done for client
Schedule future service for client
Record pictures of work carried out at each stage
Employee records work on site in realtime

Consultancy

Set up consultancy support *
Ongoing consulting support *

* Set up consultancy support

Switching to a new system can be a stressful time for any business.

You may have lists of client data in many different spreadsheets that you need to tidy up and get imported to MindaClient .

Your staff may need training and hand holding to help the transition to MindaClient.

You might want to know how to set up a campaign. You might want us to review your processes to see how MindaClient can improve your business.

We have the expertise and experience to ensure that it is done right

* Ongoing consulting support

We can put together a tailored plan for your business that will ensure you get the best from your MindaClient.

We usually arrange a monthly face to face meeting where we can answer questions, upskill the MindaClient administrator, further train your staff and support you as your company grows using MindaClient.

So many clients who have been using MindaClient for a period are amazed when we show them the additional features available in MindaClient.

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