



**mindaclient**

# MindaClient features

List of features available in MindaClient. Contact us to find out more or to arrange a demo.

## Account Management

- ✓ Account and contact management
- ✓ Campaign Management
- ✓ Case Management

## Administration

- ✓ Do your own customisation
- ✓ View Audit History
- ✓ View Archives
- ✓ Set up templates
- ✓ Manage staff and staff permissions

## Communication

- ✓ Email integration
- ✓ Set up individual signatures
- ✓ Get Automatic Email Reminders
- ✓ Individual & Bulk SMS & Emails
- ✓ Set up your own SMS & Email templates
- ✓ Individual & Bulk Emails
- ✓ Set up your own Email templates
- ✓ Integrate with Mailchimp
- ✓ Prompt to record call details mobile
- ✓ Automatic history of all communications
- ✓ Track All Email Correspondence
- ✓ Internal Communications

## Contact Management

- ✓ Calendar and Events management
- ✓ Contact Management
- ✓ Shareable appointment scheduler
- ✓ Follow-up reminders
- ✓ Shared diary facility

## Courses / Events

- ✓ Set up your courses
- ✓ Manage Waiting lists
- ✓ Assign existing or new clients to course

- ✓ Record attendance at course or event
- ✓ Communicate with all attendees

## CRM

- ✓ Advanced CRM analytics
- ✓ Account and contact management
- ✓ Complete CRM for any size team
- ✓ Group Management
- ✓ Complete picture of client
- ✓ Notes and Comments
- ✓ See who you haven't contacted
- ✓ Professional User Management
- ✓ Seamless collaboration

## Customisation

- ✓ Custom modules
- ✓ Advanced customization
- ✓ Custom Fields and Filters
- ✓ Set what users can see
- ✓ Customisable profiles
- ✓ Customise all dropdowns in system

## Data / Storage

- ✓ Data Import
- ✓ File Sharing
- ✓ Include files linked to Client or Project
- ✓ Additional data storage
- ✓ Document library
- ✓ Store and share policy documents

## HR

- ✓ Record timesheet activity
- ✓ Record annual leave
- ✓ Record sick leave
- ✓ Record other activities
- ✓ Confidential or shared option

## Integration

- ✓ Integration with your email
- ✓ Integration with Outlook Calendar
- ✓ Mailchimp Integration for campaigns
- ✓ Download reports to Excel or PDF

## Invoices & Payments

- ✓ Generate invoice for client
- ✓ Record payments against invoice
- ✓ Payments reporting
- ✓ Outstanding Balance reports
- ✓ Report for individual or overall

## Lending Management

- ✓ Lending management function
- ✓ Reminders about overdue items
- ✓ Waiting list with
- ✓ Prompts for next borrower
- ✓ Full Loan management reporting

## Navigation

- ✓ Find/Advanced Find
- ✓ Interactive Dashboard
- ✓ Assign roles at company & user level
- ✓ Mobile Version
- ✓ Bulk updating of records
- ✓ Workflow

## Online Payments

- ✓ Integration with Stripe
- ✓ Take online payments from customers
- ✓ Set up link from your website
- ✓ Full history of online payments
- ✓ Full Payment History in MindaClient
- ✓ Security with global payments partner

## Online Registration

- ✓ Let your customers register online
- ✓ Link from your website into MindaClient

## Project Management

- ✓ Create Milestones, Pipelines and Tasks
- ✓ Task and event tracking
- ✓ Print Gantt chart for individual client
- ✓ Gantt Chart for staff & for date range

## Reporting

- ✓ Comprehensive Reporting
- ✓ Filter by Client Profile & Activity
- ✓ Reports and dashboards
- ✓ View Completed Tasks and Events
- ✓ Report by Client and overall
- ✓ View Task and Event Reports
- ✓ Download reports to spreadsheet or PDF
- ✓ Graphical Reporting

## Sales

- ✓ Targets for individual staff
- ✓ Lead Management
- ✓ Opportunity / Pipeline Management
- ✓ Opportunity / Pipeline tracking
- ✓ Quotes & Orders
- ✓ Sales Forecasting
- ✓ Sales tools with enhanced collaboration
- ✓ Team selling
- ✓ Territory management

## Stock / Inventory

- ✓ Stock management
- ✓ Order & Receive Stock
- ✓ Email orders to suppliers
- ✓ Bar code scanning of stock
- ✓ Assign stock to customers as you sell
- ✓ Automatic depletion of stock
- ✓ Stock level report
- ✓ Prompt to reorder

## Support

- ✓ Gold star support
- ✓ Mobile Device Support
- ✓ Contact us by web, email or phone

## Timesheet / Job Management

- ✓ Record individuals' timesheets
- ✓ Assign hourly rates to employees
- ✓ Record materials used on jobs
- ✓ Record internal & external notes
- ✓ Report by employee and by company

## Training

- ✓ Onsite training available
- ✓ Online training available
- ✓ Webinars and live training available

## Set up consultancy support

Switching to a new system can be a stressful time for any business. You may have **many** lists of client data in **different** spreadsheets that you need to tidy up and get imported to MindaClient .

Your staff may need raining and **support** 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 a **seamless transition**

## Ongoing consulting support

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

We can **schedule regular** meetings **either online or onsite** where we can answer questions, upskill the MindaClient administrator, further train your staff and support you as your company grows using MindaClient.

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