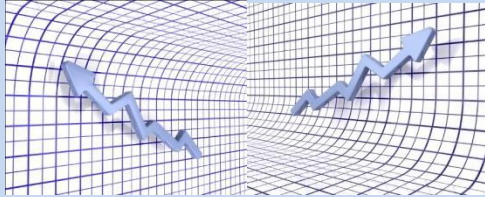


# What is REDPOT CRM?

Maximize your sales by knowing your customer



## What is CRM?

All your communication exchange with your customer or a prospective customer is very important to the growth of your organization, and CRM is a tool, which will allow you to get a 360 integrated view into customers & their relation with your products and services.

Now this looks simple isn't it. But frankly speaking, the CRM processes more complex tasks to give you simpler results of visibility into your Products & Services versus your Customers.

With new social media, communication exchange through modern gadgets, a lot has changed the way traditional CRM used to be. Now organizations need a greater insight into their customers to build competitive products and services. So lets see, how we can achieve "Maximizing Sales using REDPOT CRM".

## REDPOT CRM Advantage

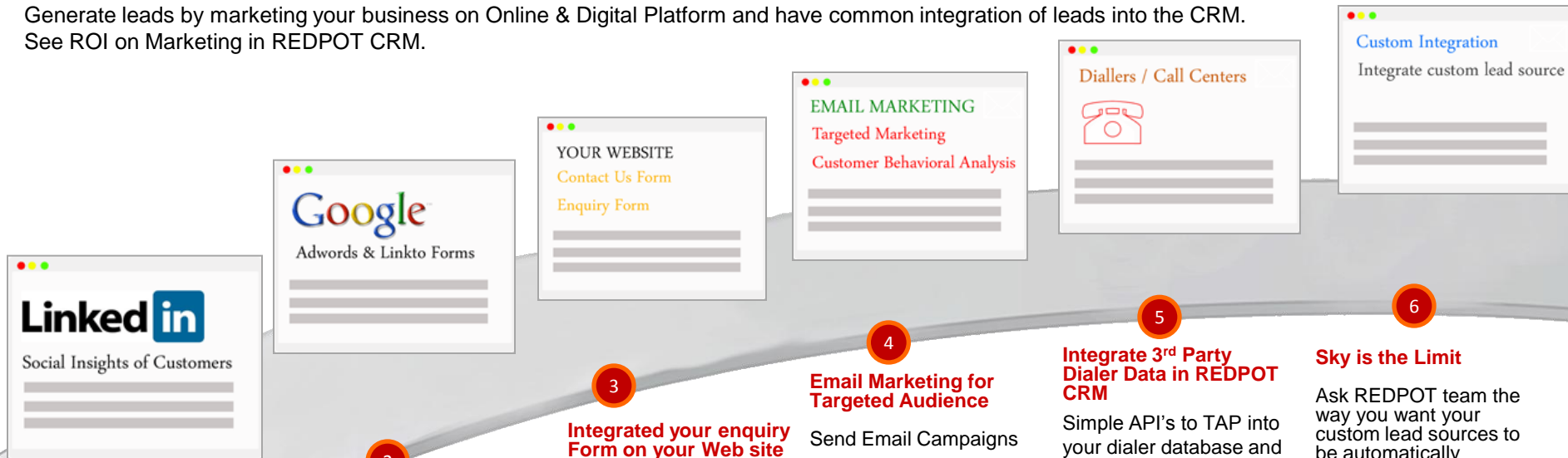
A successful CRM implemented Organization has the following advantages

- Save time on routine sales tasks
- Greater visibility of Information across stake holders
- 360 Customer View (Customers – Products – Sales – Delivery)
- Zero loss of communication correspondence with customers
- Cross Sell & Up-Sell Opportunities
- Greater Depths on Sales forecasting
- Strategic Decisions towards better products and services
- Easy Digital Marketing
- Automating Routine Functions  
Renewals, Invoices, Payment Reminders etc
- Web Integration - Shopping Carts etc
- Integrate Leads from any web platform
- Customer Behavioral Analysis etc.



# Gain Customers – Marketing & Lead Integration

Generate leads by marketing your business on Online & Digital Platform and have common integration of leads into the CRM. See ROI on Marketing in REDPOT CRM.



1

## Gain Social Insights of Customers

Single Click to know all possible contacts in and around your prospective customer.

2

## Advertise on Social Media (Google, Facebook etc)

Link your landing forms to REDPOT CRM. Multiple landing pages approach for tracking best receivability

3

## Integrated your enquiry Form on your Web site

Prospects fill out a Web form, which creates a lead in REDPOT CRM

Ability to assign to specific users in the CRM

Shopping Cart Integration to REDPOT CRM

4

## Email Marketing for Targeted Audience

Send Email Campaigns  
Track Response  
Customer Behavioral Analysis  
Geographical Location Impact

5

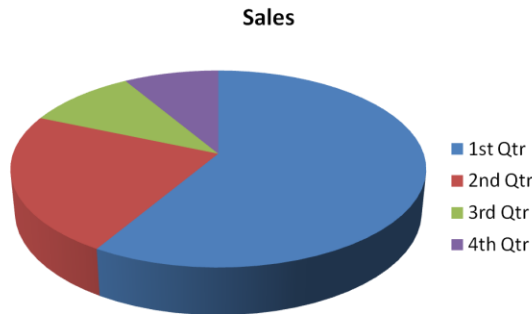
## Integrate 3<sup>rd</sup> Party Dialer Data in REDPOT CRM

Simple API's to TAP into your dialer database and create lead information into the REDPOT CRM directly

6

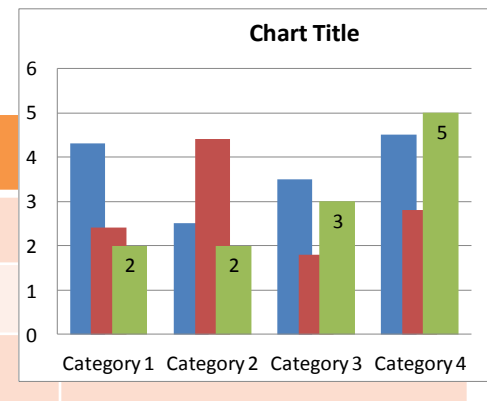
## Sky is the Limit

Ask REDPOT team the way you want your custom lead sources to be automatically integrated into REDPOT CRM



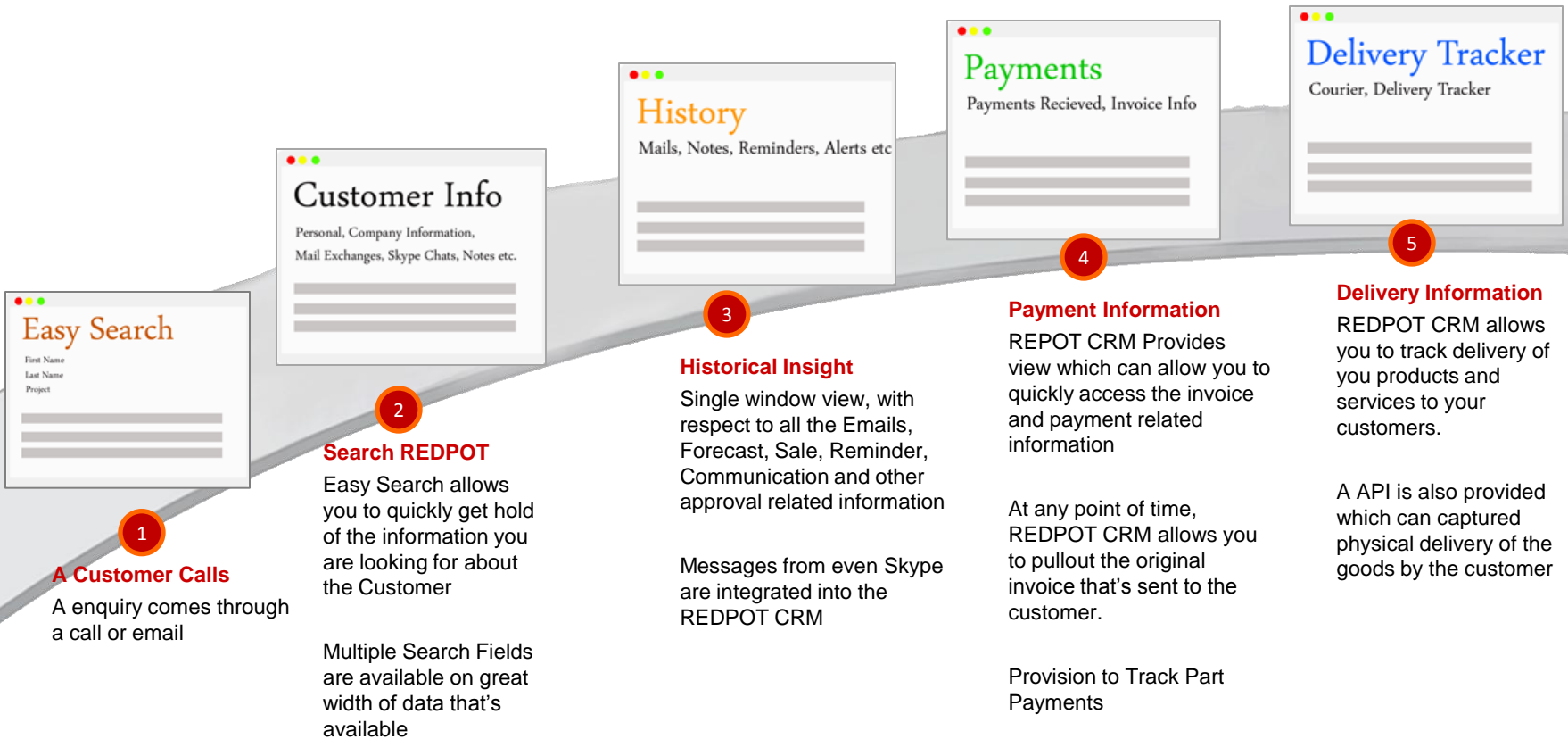
## Measure Real-time

- Leads From Sources
- Sales Pipeline
- Product Demand



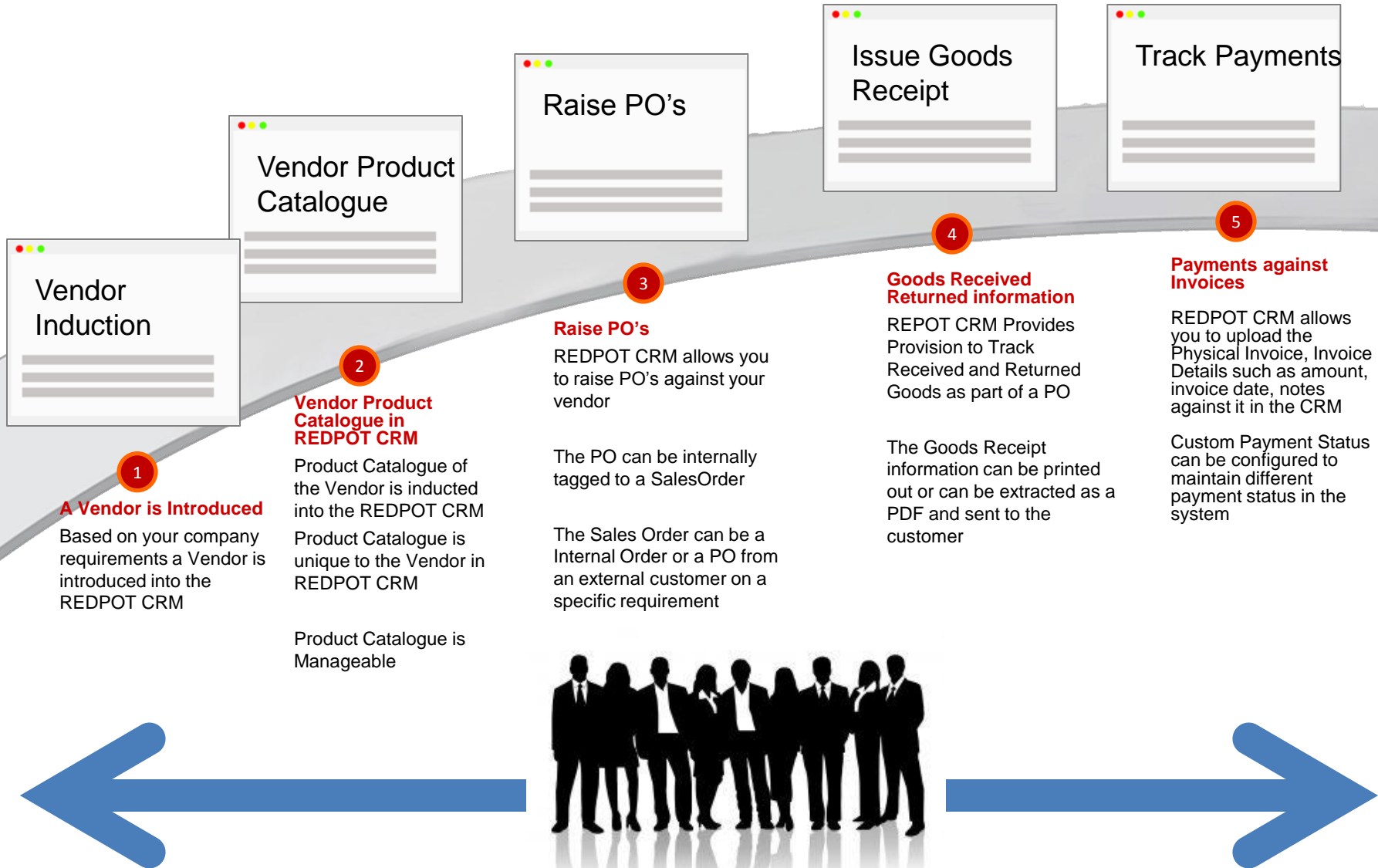
# Manage Customer Relationships

When you get a call or Email, start by searching REDPOT CRM. Get insights to Historical Relationship of the customer with your company and its products and services



# Manage Vendor Relationships

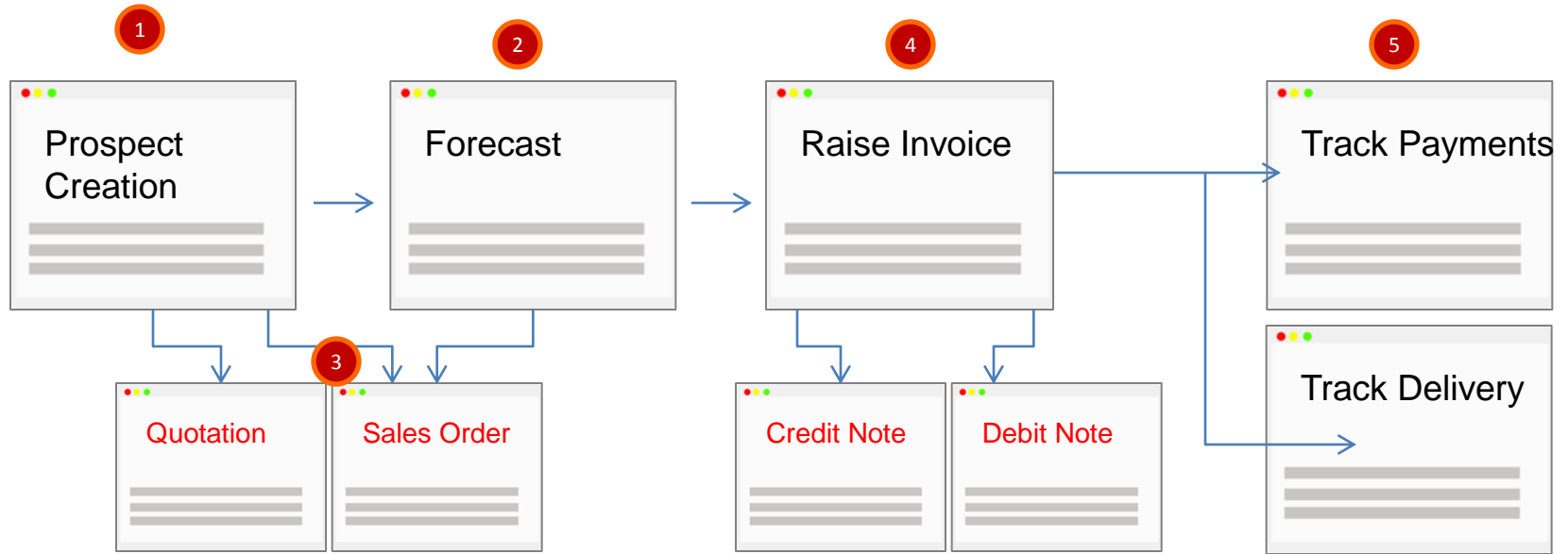
With REDPOT CRM, Your Organization can effectively manage Vendor Relationships. From Email Communication –to- Closing a Payment on a Invoice You can do many activities involved in Vendor Management with REDPOT CRM



Approval Process in Place

# Customer Management From Lead to Sale

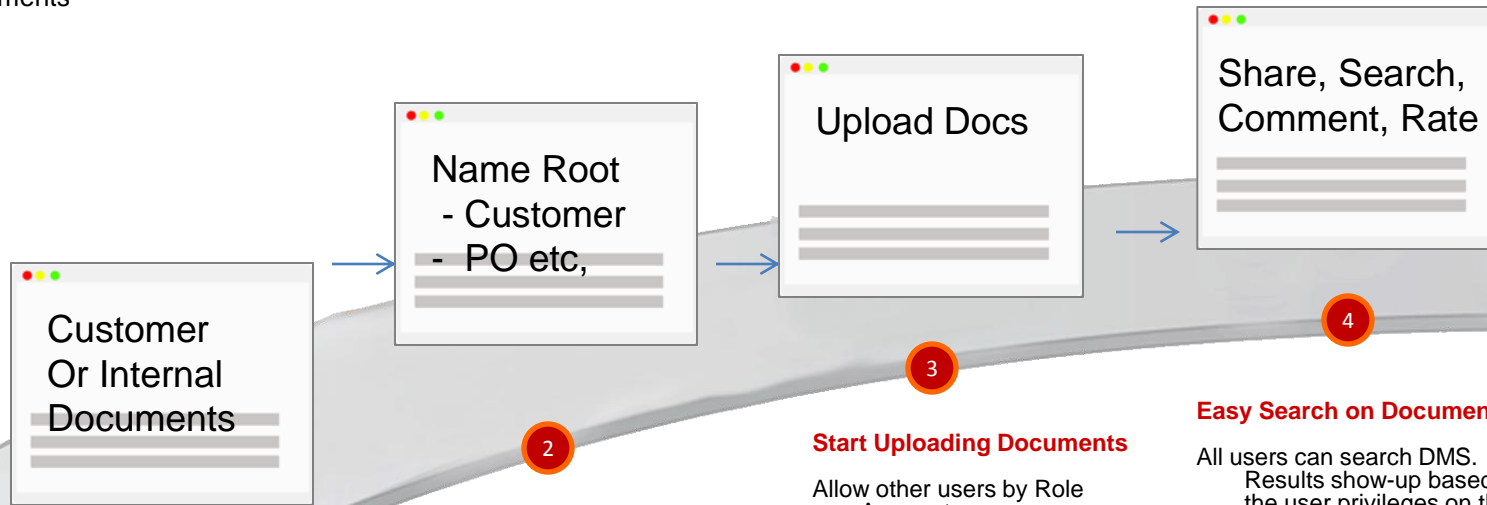
With REDPOT CRM, Your Organization can effectively manage Customer Information, Forecast, Close to Sale to Raise Invoice, Also issue credit and Debit Memos on various transactions. REDPOT CRM also allows you to raise Quotes, Sales Orders for Customers



Approval Process in Place

# Document Management System

Effectively Manage your internal and external documents with REDPOT CRM. Allow Rating, Changes, Comments and Version Management on Documents



1

## A need to store and manage documents

Based on your company requirements you can store any document and index it for searching later

You can also allow other users to comment, rate, view and add new versions to your document

2

## Name your principal root folder and start uploading

Store your documents under a name, which can be

1. Customer Number
2. Company Name
3. Project
4. Purchase Order etc

3

## Start Uploading Documents

Allow other users by Role Access to

1. View
2. Upload new documents under tree
3. Rate Document
4. Comment

4

## Easy Search on Documents

All users can search DMS. Results show-up based on the user privileges on the documents.

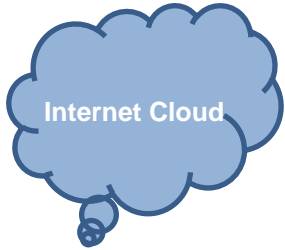
Users can rate, comment, download documents.



User Role based Access to Documents

# Security

Three Level Security to your CRM



1

## REDPOT CRM is cloud based

Cloud based CRM allows you to access CRM on variety of devices, such as Desktops, Notebooks, Mobile Applications, Ipads etc.

Independent IP



2

## Restricted access to IP

REDPOT CRM allows, you to give restrictive access to IP's which you intend to give access to.

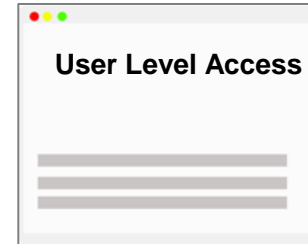
Option of HTTPS



3

## Option to interact only via HTTPS

REDPOT CRM allows you to put up the entire instance on HTTPS. Accessing Web Pages over HTTPS protocol is encrypted



4

## User Level Access

User level access can be provide at each page of the CRM

Note: RED POT INFOTECH PVT LTD can offer customized solution for further security, such as VPN Token access, Installation of custom Security Certificate etc. For more information email [sales@redpotcrm.com](mailto:sales@redpotcrm.com)

## Contact Information

Email / Call to RED POT INFOTECH PVT LTD

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