

Increase profitability
through customer
loyalty

DEMO



Leave a message





WHAT IS



CRM



Customer Relationship Management

- **CUSTOMER RELATIONSHIP MANAGEMENT (CRM) IS AN APPROACH TO MANAGING A COMPANY'S INTERACTION WITH CURRENT AND POTENTIAL FUTURE CUSTOMERS THAT TRIES TO ANALYZE DATA ABOUT CUSTOMERS' HISTORY WITH A COMPANY AND TO IMPROVE BUSINESS RELATIONSHIPS WITH CUSTOMERS, SPECIFICALLY FOCUSING ON CUSTOMER RETENTION AND ULTIMATELY DRIVING SALES GROWTH.**



Choose your language:

English (US) ▼



[Installation Guide](#)

LET'S



WHAT IS

Espo CRM?



Espo : Customer Relationship Management

- **AN OPEN SOURCE WEB APPLICATION THAT ALLOWS YOU TO SEE, ENTER AND EVALUATE ALL YOUR COMPANY RELATIONSHIPS REGARDLESS OF THE TYPE. PEOPLE, COMPANIES, PROJECTS OR OPPORTUNITIES- ALL IN AN EASY AND INTUITIVE INTERFACE.**

WHERE IS IT USED?



Wholesale and retail trade



E-commerce



Banking



Call-centers



Manufacturing



Education



Travel & Tourism



Real Estate



Healthcare



Insurance

LANGUAGE SUPPORT



English



German



Spanish



French



Dutch



Turkish



Czech



Romanian



Polish



Portuguese



Russian



Vietnamese



Indonesian



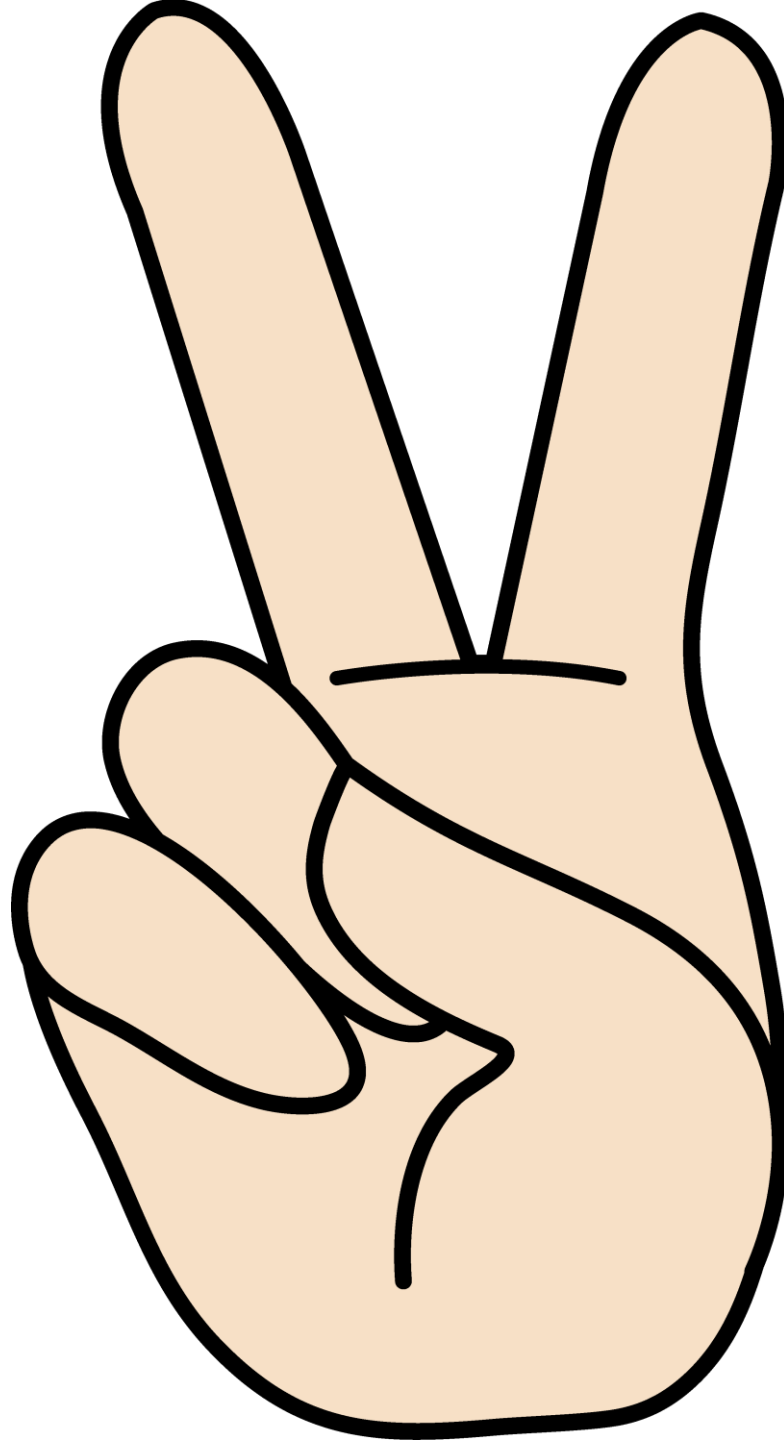
Ukrainian



Italian

AVAILABLE

|N



OPTIONS



EspoCRM On Premise

- CRM DATABASE IS STORED LOCALLY.
- CRM SOFTWARE RUNS ON YOUR OWN HARDWARE.
- NO DATABASE SIZE LIMITATIONS.
- OPEN SOURCE CRM AND IS FREE TO USE.
- MODIFY THE SOURCE CODE ACCORDING TO THE NEEDS.
- NO ADVANCED PACK AND VOIP INTEGRATION INCLUDED.



EspoCRM in the Cloud

- GET UP AND RUNNING QUICKLY
- FULL SET OF FEATURES
- NO HARDWARE REQUIRED
- NO CRM SOFTWARE INSTALLATION OR MAINTENANCE NEEDED
- SWITCH TO ON-PREMISE AT ANY TIME

Sales Automation

- ❑ LEADS. CONVERTING LEAD TO OPPORTUNITY/ACCOUNT/CONTACT.
- ❑ OPPORTUNITIES. POTENTIAL SALES IN CRM.
- ❑ ACCOUNTS. EACH ACCOUNT IS A CENTRAL RECORD IN B2B MODEL.
- ❑ CONTACTS. CONTACT CAN BE RELATED TO MULTIPLE ACCOUNTS WITH SPECIFIC ROLES OF RELATIONSHIPS.

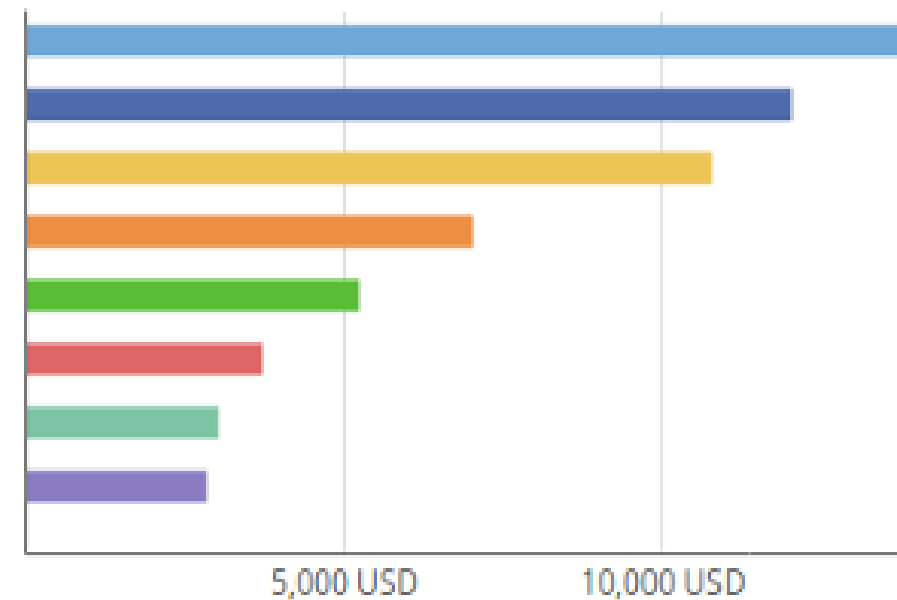


▼

Actions ▼

- Name
- Negoi
- Fagaras 5 Pro Price
- Prom City 5003
- Deal No 500
- Proper Education 60

Opportunities by Stage



Calendar

← Today September 7 - 14, 2014

37	Sun 07	Mon 08	Tue 09	Wed 10
07:00				
08:00		08:00 - 09:45 Discuss quote		
09:00			09:00 - 10:00 Find out requirements	
10:00		10:00 - Ask about discount		
11:00				
12:00				



- MEETINGS
- CALLS
- TASKS
- SENDING INVITATIONS TO ATTENDEES.
- GOOGLE CALENDAR INTEGRATION (AVAILABLE IN ADVANCED PACK)
- SHARED CALENDAR. USER CAN SEE SCHEDULES OF COWORKERS.

Emails

OUTBOUND EMAILS

EMAIL TEMPLATES

EMAIL FOLDERS

EMAIL ACCOUNTS : AUTOMATIC ARCHIVING

EMAILS FROM PERSONAL OR GROUP |MAP

ACCOUNTS. |INCOMING EMAILS AUTOMATICALLY ←

GET LINKED TO CORRESPONDING RECORDS.

EMAIL SIGNATURE

EMAIL FILTERS

MASS EMAIL

MULTIPLE EMAIL ADDRESSES PER A RECORD

To *
Alban Goran » goran@4m.com

BCC

Parent
Account

Select Template

Subject *
Welcome to CRM

Body

Alban Goran

EspoCRM

Attachments
Calendar.png

Is Html

Social

Stream

I had a call with Mr.Bar. Now all seems clear.

Post



In Process John Sales updated status

13:12

Will Manager created meeting Discuss price linked to this lead

13:10

Will Manager posted

This lead is very important for us. Please handle this ASAP.

13:09

Assigned Admin created this lead assigned to John Sales

12:59

ACTIVITY STREAM. FEED WHERE CHANGES AND NEW ADDITIONS OF FOLLOWED RECORDS ARE SHOWN.



FOLLOW BUTTON. USER CAN FOLLOW PARTICULAR RECORD. RECORDS ONE CREATES OR THOSE THAT GOT ASSIGNED TO ONE ARE FOLLOWED AUTOMATICALLY.

Customer Support

- CASES
- EMAIL-TO-CASE
- CUSTOMER PORTAL
- KNOWLEDGE BASE



Other Features

➤ INVENTORY MANAGEMENT :

- PRODUCTS (AVAILABLE IN ADVANCED PACK)
- QUOTES AND INVOICES (AVAILABLE IN ADVANCED PACK)

➤ Misc :

- MAPS. DISPLAYED BASED ON ADDRESS FIELDS.
- DYNAMIC FORMS
- CALCULATED FIELDS
- GOOGLE CONTACTS INTEGRATION (AVAILABLE IN ADVANCED PACK)

➤ ANALYTICS :

- REPORTS (AVAILABLE IN ADVANCED PACK)

➤ MARKETING AUTOMATION :

- CAMPAIGNS
- TARGET LISTS
- SYNC TARGET LISTS WITH REPORTS (AVAILABLE IN ADVANCED PACK)
- EMAIL MARKETING
- MAILCHIMP INTEGRATION (AVAILABLE IN ADVANCED PACK)

Other Features

➤ TELEPHONY :

- VOIP INTEGRATION (AVAILABLE AS VOIP INTEGRATION EXTENSION)
- MULTIPLE PHONE NUMBERS PER RECORD. DIFFERENT TYPES OF PHONE NUMBERS (MOBILE, OFFICE, FAX, ETC.).

➤ WORKFLOWS :

- WORKFLOW MANAGEMENT (AVAILABLE IN ADVANCED PACK). ACTIONS CAN BE TRIGGERED IF SPECIFIC CONDITIONS ARE MET. AVAILABLE ACTIONS: SEND EMAIL, UPDATE RECORD, CREATE NEW RECORD, CREATE NOTIFICATION, ASSIGN RECORD BY SPECIFIC RULE.

➤ ADMINISTRATION :




- DATA IMPORT
- USERS. NO USER LIMITATION IN ON-PREMISE VERSION.
- TEAMS. USERS CAN BE ORGANIZED INTO TEAMS.
- ROLES. ACCESS CONTROL CAN BE SET FOR WHOLE TEAM AND SPECIFIC USER.
- LDAP AUTHENTICATION
- CURRENCY RATES
- THEMES SUPPORT

➤ CUSTOMIZATION :

- LAYOUT MANAGER. CHANGE LAYOUTS FOR DETAIL AND LIST VIEWS.
- ENTITY MANAGER. CREATE CUSTOM ENTITIES, FIELDS AND RELATIONSHIPS.
- EXTENSIONS. ABILITY TO CUSTOMIZE YOUR ESPOCRM WITH INSTALLABLE EXTENSIONS.

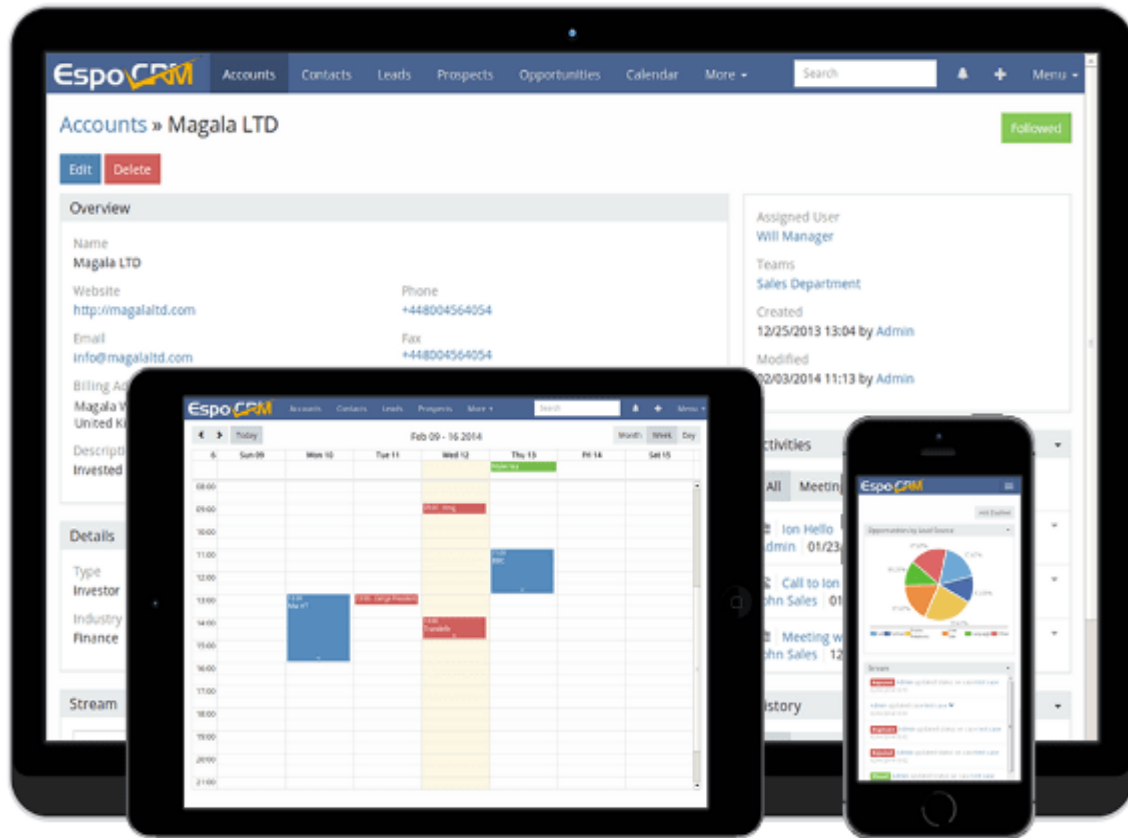
WHY ESPO CRM ?

Bitnami makes it easy to run EspoCRM in the cloud, locally or virtually. The Bitnami EspoCRM Stack is:

-  **Up-to-date**
We track every release of EspoCRM and update our stack shortly after it's released.
-  **Secure**
If serious security issues are discovered, we provide new versions of EspoCRM as soon as possible, often within hours of the availability of a fix.
-  **Consistent**
With Bitnami, you get the same software stack and configuration regardless of where you are deploying EspoCRM or other Bitnami Applications. This makes it easy to migrate between different platforms.

With the Bitnami EspoCRM Stack compiling, configuring and all of its dependencies are taken care of, so it works out-of-the-box.

Advantages



- WEB BASED CRM. ONE VERSION FOR ALL YOUR DEVICES.
- FREE OF CHARGE AND OPEN SOURCE CRM DISTRIBUTED UNDER GPLv3.
- TESTED WITH MOST HOSTING PROVIDERS.
- NEW FEATURES EVERY 2 MONTHS.
- RESPONSIVE DESIGN AND LATEST WEB TECHNOLOGIES.
- LIGHTNING FAST.
- NO USER LIMITATION.
- CLOUD AND ON-PREMISE VERSION AVAILABLE.
- EASY TO CUSTOMIZE.
- OPEN ARCHITECTURE FOR THIRD PARTY INTEGRATION VIA API.

It's



FOR

COMMERCIAL AND PERSONAL USE

A close-up photograph of a hand holding a blue fountain pen, writing the words "Thank you!" in a cursive script on a white surface. The pen is positioned at the end of the word, with the nib pointing towards the right. The background is a soft, out-of-focus white.

Thank you!

AMIYA BHUSHAN (14UCS052)

PARTH DESAI (14UCS037)

SNEH ANKUR (14UCS055)