



Softera.

Basic CRM

A Simple, Intuitive CRM
for Mid Businesses

Basic CRM

Basic CRM is a pipeline-focused CRM designed specifically for medium size businesses and teams looking to move beyond spreadsheets and seamlessly start their CRM journey. Effortlessly track customer interactions, automate workflows, and boost productivity.

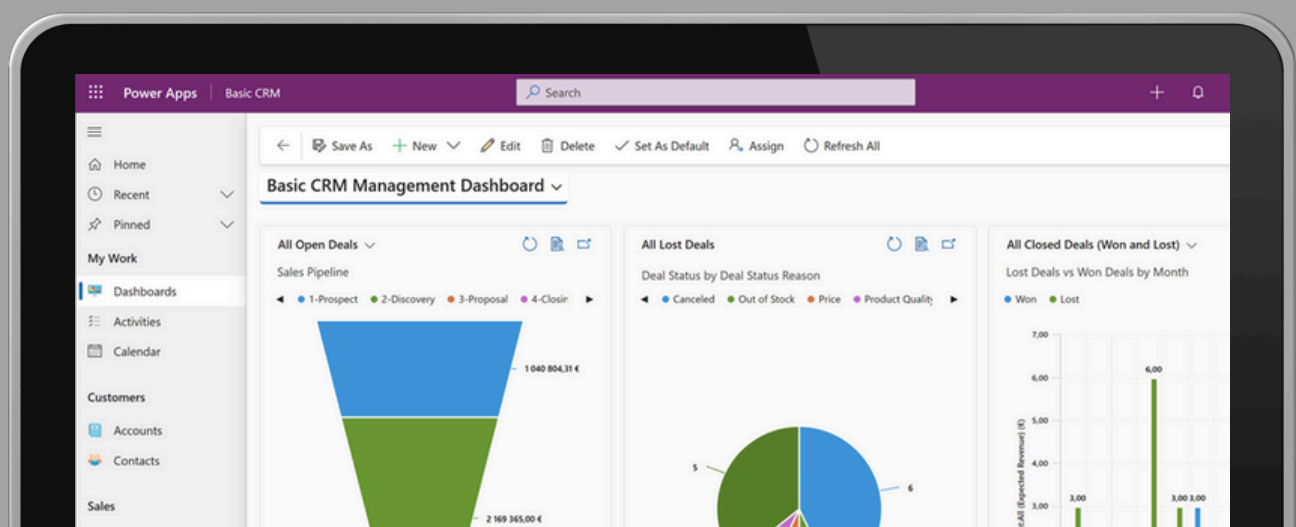
Key features

Seamless Microsoft 365 Integration

Basic CRM syncs perfectly with your Microsoft 365 account, eliminating the need for manual data entry of contacts and calendar events across platforms. With Single Sign-On (SSO), you can access Basic CRM in just one click from within your Microsoft 365 account.

All Customer Data – Centralized in One Place

Store all essential customer details in a single, organized system—from contact information to communication history and deal progress. This ensures your team can collaborate seamlessly, avoid data loss, and make informed decisions.





Manage Pipelines

Streamline deal management with proactive alerts, automation, and intuitive interface. Reduce the time spent on each deal and optimize your sales cycle.



Automate Workflows

The Power Apps platform allows you to flexibly adapt CRM to your process or needs. Easily set up workflows to automate routine tasks, giving you more time to focus on selling. Use scheduling tools to plan future interactions with customers.



Track Key Metrics

Monitor all critical customer metrics in one place. Analyze sales performance and gain deeper insights with built-in Power BI dashboards.