exactllyCRM
lead to success

More Customer More Sales

Register for FREE No Obligation Demo at
www.exactllycrm.com

Boost Your Performance by over 40%

Grow Sales Pipeline

Increase Sales Productivity

Improve Business Performance

Detailed Business Insights

Why Choose exactllyCRM?

Be Organized
Integrate emails, tasks, calendars and much more.

Predict Your Future
A reasonable expectation of future based on past performances and events.

High-level Configuration Capability
Create call flows, agent scripts, reports and modify them as per specific requirements.

Work Smarter, not just Harder
Better information at your finger tips. Best practices codified into your business policies.

Marketing and Sales Enablement
Create lists, campaigns, workgroups. Track information regarding processes, campaigns.

Robust Management
Manage sales force, processes, orders, or opportunities. Track all meaningful information.

Integrated Multimedia Capabilities
Send emails to prospects and customers starting with lead generation, through service and post-sales.

More from Your Established Customers
Analyze all customer data points and group customers according to their behavior.

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Benefits

Email Marketing
- Mailing Lists
- E-mail / Mail Merge Templates
- Create and Execute Campaigns across Marketing Channels
- Capture leads Directly into the CRM System
- Provide detailed Views into Campaign Effectiveness across Marketing and Sales Stages

Sales Force
- Manage Leads, Accounts & Contacts
- Conversion of Leads to Potentials
- Maintain complete History of calls made to Contacts
- Manage Schedules, Calls, Meetings, and Emails from a Single Location
- Options to add Meetings against your Leads & Potentials

CRM Role Management
- Creation of Team as per your Organization Structure
- Control the Access to Modules according to the User's Roles
- Archive the login history of each User for better Auditing
- Share CRM data with Users as per their Job Role (CEO, Vice President, Manager etc.) in an Organizational hierarchy

Contact Management
- Unlimited Custom Fields
- Track Activities, Sales Opportunities, Quotes, etc. by Contact
- Group Contacts into Accounts for Single View of Related Information
- Assign Leads to Team Members with Email alerts

Sales Process
- Setup Custom Sales Stages and Sales Information
- Track Goals versus Attainment
- Multiple Sales Reports (pipeline, closes, leads, etc.)
- Supports Sales Teams and Sales Team Management

Sales Quotations
- Create, Save and Edit Sales Quotations
- Create PDFs of Quotations for Customers - branded with Your Logo!
- Track Quotations by Contact
- Integrated Product Catalog

Lead Management
- Facilitate faster Sales Lead Distribution through the Lead Assignment Rules
- Qualify Leads to next Stage based on the Information captured in Lead Details
- Customize Lead Management process as per Your Organization Sales Process

Potential Management
- Track all Sales Opportunities end-to-end in a Sales Cycle
- Track Competition on each Business Opportunity and Assess your Strengths and Weaknesses
- Set up Sales Stage and Probability of winning Deals using drag and drop Customization Wizard

Account Management
- Track all Accounts and related Contacts, Opportunities and other details from a common Repository
- Associate Accounts and related subsidiaries or sub divisions by setting Parent-child Identifiers

Dashboard
- 40+ standard CRM Reports in Sales, Marketing, Customer Support, and Inventory Management Modules
- Create Cross-link Reports Spanning across Multiple Modules
- Perform Arithmetical Operations using Aggregate Functions (sum, average, min and max)

Campaigns — Generates → **Leads** — Converts into → **Opportunities** — Feeds into → **Feeds into**
Leads feeds into **Account**
Opportunities feeds into **Contacts**

Determine Success with exactllyCRM