

# MYCRM World

MyCRMWorld combines CRM, workflow automation, and AI-driven enterprise intelligence to help businesses improve lead conversion, customer engagement, productivity, and measurable ROI.



## Perfect CRM for

- Enhancing the operation of sales, marketing and customer service functions
- Deploying quickly and simply
- Executing marketing campaigns
- Progressing sales opportunities
- Making customer interactions more effective and profitable
- Using in the office or on the move(Cloud Base)
- Mobile user Friendly(App)



## TELEPHONY



## MOBILE APP





## Marketing

- Campaign management
- Email/sms marketing
- Email templates
- List management & segmentation
- Web forms
- Mass email
- Capture leads from website
- Campaign monitoring & alerts
- Reporting and Analytics
- Autoresponders

## Sales Automation

- Lead management
- Contacts & Accounts Management
- Opportunity monitoring & alerts
- Partner relationship management
- Quote management
- Sales action plan
- Sales dashboards
- Sales forecasting
- Sales pipeline management
- Sales reports
- Territory management

## Dashboards

- Dashboard with current day activities and pending activities.
- Access to daily, weekly and monthly calendar.
- Graph to explain the overall work versus each persons work with sub classification.
- Single Click Chart Reporting
- Graphical & Separate dashboard User Wise and Management wise.
- Easy to use & Configure dashboard.
- Complete analysis from Single Screen.
- Multi Module wise reports
- Users can create business-specific dashboard
- Monitor your sales reps and teams Performance.
- Customize your Dashlet to display data in a variety of formats.

## Support Management

- Support Case
- Ticket Management
- Case monitoring & alerts
- Web/Email/Sms to case Creation.
- Knowledge base
- Email notifications & SMS notifications
- Complete Support Analysis
- Self Service Portal
- Document Management
- User Performance Tracking
- Assignment Rules
- Case Escalation Rules
- Bug Tracking
- RMA Management in Details
- Courier Inward/Outward
- Escalation matrix / SLAs Management

## Sales Quotations

- Create, save and edit sales quotations
- Customized Quotation format as per Client.
- Track quotations by contact
- Integrated Product Catalog
- Email, Print quote as a PDF directly from CRM.
- Revise and re-Publish quotes at any time
- Calculates sales tax and totals
- Attach Purchase Orders, Work Orders, Bills, etc in different formats.

## Customization

- Multilingual & multi-currency
- Page layouts
- Personalize the interface
- Process customization
- Unlimited custom fields
- Customized Existing Modules.
- New Module Creations.
- Customized internal/external email alerts



## Hosting

- On our Hosted cloud Server
- On-premise
- Secure your critical data, encrypt your information, keep records safe on highly secure servers & automatically get backups.

## Setup & Onboarding

- Consulting services
- Development services
- Fast & simple setup
- Implementation services
- Simple & easy to learn
- Training (private)
- Training webinars (free)
- Normal User Training
- Admin Training
- Customization Training

## Productivity/Task Management

- Track completed activities by contact/Client
- Task Status, Done/Pending/ Overdue
- Schedule future activities
- Dashboard reminders for upcoming activities
- To-do list
- Calendar & Day Planner
- Google Calendar/Outlook integration
- Email
- Task Creation & Assignment to Users/ Team
- Reminder By Pop up & by E- Mail/ SMS

## Add-on Integration

- Asterisk Click to Call .
- Whatsapp Integration
- SMS Automation
- Tally Integration
- ERP Integration
- Twilio Call Log
- Freshdesk Integration
- Sync Contactually
- Google Sign-In Integration
- Integration of gmail, Outlook,mailchimp etc.
- API Integration
- Quickbook Integration
- LinkedIn Integration

## Contract/AMC Management

- Schedule Contract/AMC Service
- AMC Agreement
- Auto AMC / Service Reminders
- Industry Vertical wise Implementation
- PMS Visit Scheduling(Free Visit or Service )
- AMC Time Period.
- Product Details(Warranty tracking)
- Machine Site Installation Details

## Invoice Management

- Issue invoices directly from the CRM
- Convert Quotations to Invoice
- Access control on Invoice generation & Approval
- Save all invoices in a single place and find them easily using search
- Send invoices to clients by email, print them, and save them as PDFs
- Attach Quotation and other documents in different formats.



## Products Module

- Products Name
- Part Number of Products
- Serial Number wise Products tracking
- Warranty Start & End date Tracking
- Products List View
- Products Category
- Products Manufacturer Detail
- Products Units
- List Price of Products
- Purchase Price
- Sales tax rate
- Products to Child Products.
- Importing Products
- Attached Picture of product
- Description

## Automations and Workflow

- Assignment of Lead,Case,Task and Meetings
- Workflow Rules
- Scheduled Action
- Workflow Usage
- Reminder for Workflow Tasks
- Email Notifications,SMS ,Whatsapp etc.
- Record Owner, Record Creator, Record Owners Manager (options in Alert)
- Delete (Execute On Record Action)
- Field Update (Execute On Record Action)
- Approval Process
- Custom Schedules
- Organization & Department workflow / chart
- Tracking of Renewals



## Security Management

- Roles,Profile and, Teams
- Customize User Layout
- Reporting Hierarchy
- Territory Management
- Groups
- Field-Level Security
- Public Read Only(in Default Data Sharing Settings)
- Data Sharing Rules
- Audit Logs
- Data Encryption
- Record Sharing
- Data Security

## USER ACCESS CONTROL

- Support for multi office, multi division management.
- Support for user groups with separate access control
- No access to each other for work items belongs to two different groups.
- Superior admin control with birds eye view to all users and work items.

**MyCRMWorld**



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AI-driven workflow orchestration

ROI-focused enterprise automation

Intelligent sales & marketing automation

Automated customer engagement

Workflow intelligence and business productivity improvement

Configurable enterprise automation platform

- Scalable across Solar, BFSI, Manufacturing, D2C, Services

