companyhub

Make Your Sales Team 33% More Productive

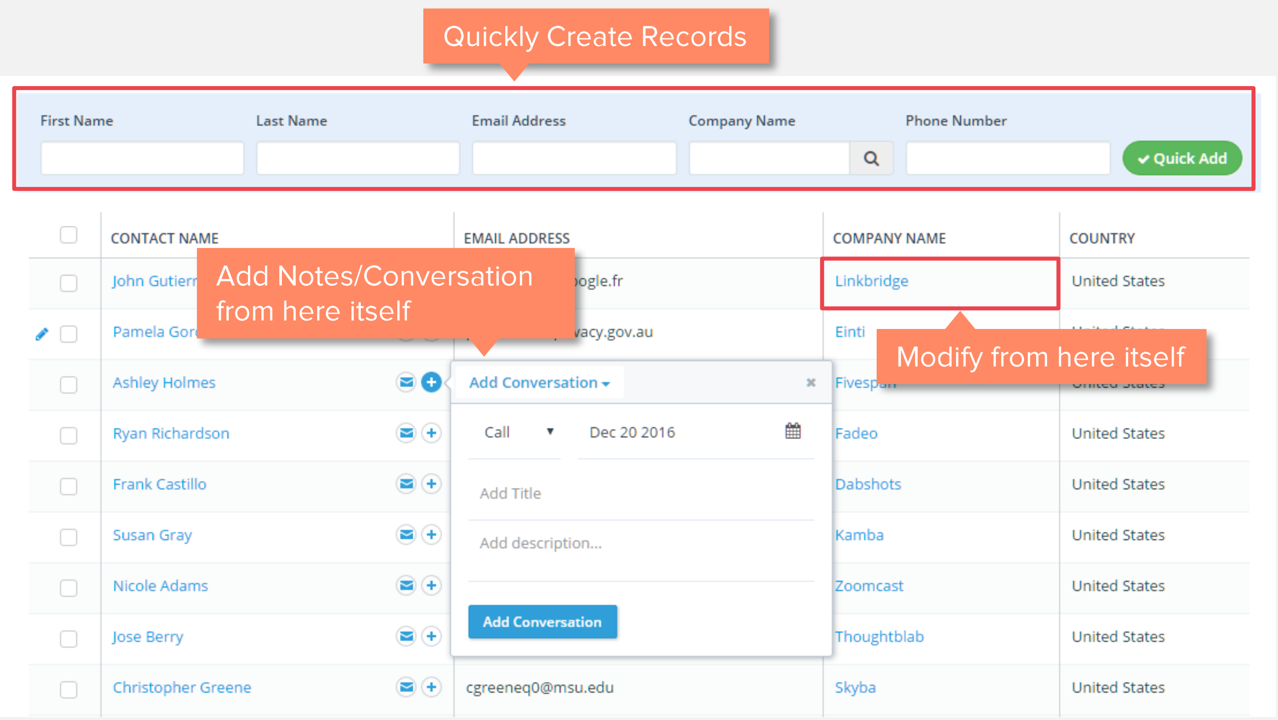
- Leads & Client Management
- Sales Pipeline
- Quotes & Orders
- Reports
- Customization
- Access Control
- Automation

Sales People Don't Like CRMs. And Its NOT Their Mistake!

Sales people don't update CRMs and switch back to Excel because CRMs are time consuming. But not CompanyHub.

CompanyHub lets you do everything from single place – like Excel

Create new contacts, add conversation, notes, tasks or update fields like excel – all from a single page, that too similar to excel.



Adding Leads & Clients to CompanyHub

You can effortlessly get all your leads & clients in CompanyHub:

1

Upload File (No specific format required)

Almost every software, including excel, lets you export your data in CSV file. You can upload this file, map the columns to field, and import! It does not require any fixed format. And you can import any kind of data using file, not just leads.

From Email

2

Get the leads in email from other websites? CompanyHub can create leads directly from email

3

Capture from website / social media

When people fill forms on your website, lead is automatically created

Manually

Use ‘Quick Add’ or ‘New’ to create contacts

4

Email Integration

Email Sync (Optional)

When you create a contact with email, its email conversation is automatically synced every few hours - if email sync is enabled. Even mails sent from outside CompanyHub are synced. No need to manually copy paste emails.

Track Email Opens & Clicks

You can track mails sent using CompanyHub / Gmail. Whenever the recipient will open email / click link, you will get real-time notification. You can also see which mails were not opened and followup with them.

Bulk Mail

You can send a mail to multiple recipients in 1 click. Email can be personalized for each person by adding fields like First name, Company etc.

Other Features

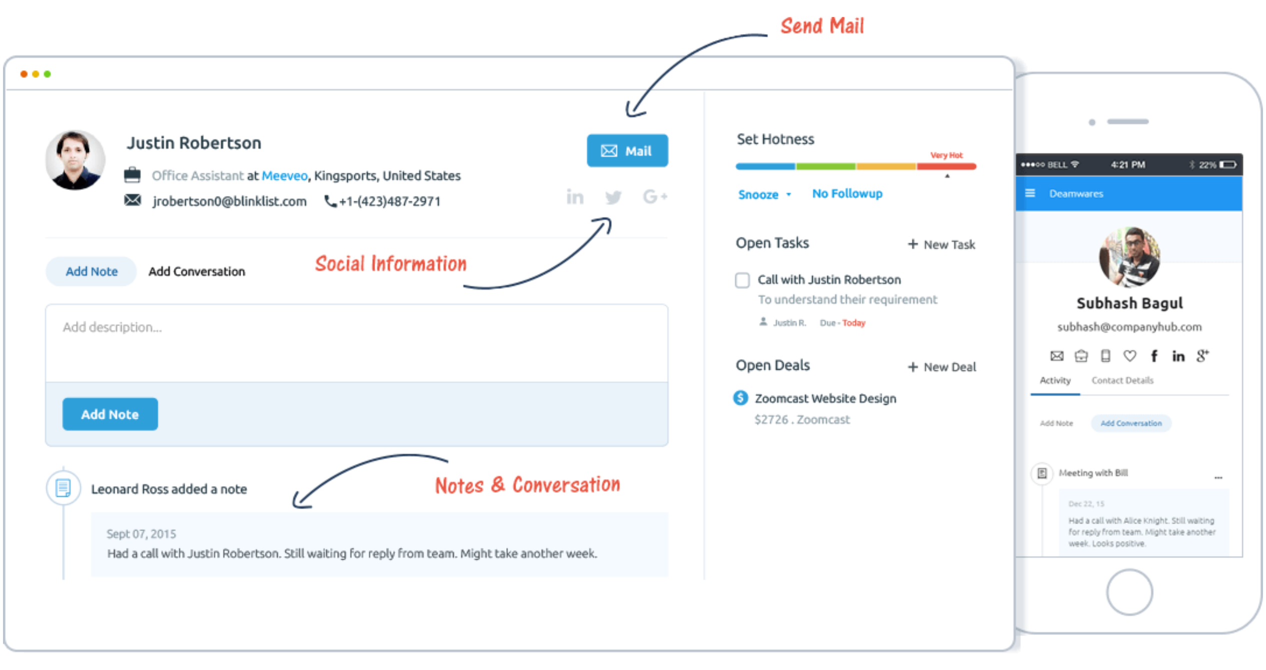
- **Followup from CompanyHub**
- **Schedule Email**
- **Remind if no reply**
- **Gmail Plugin**

360° View at a Glance

Overview tab of Contact is like a complete contact dashboard. You can see previous conversation and notes. Send followup. Quickly see social profiles before the meeting. Change hotness. See open deals and tasks. Create new ones. You can also add notes, log calls and other communication.

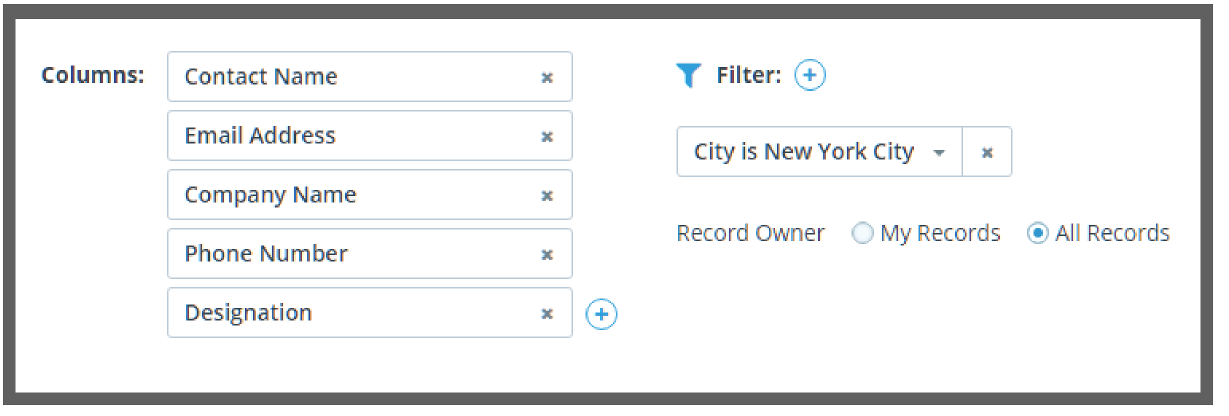
Your sales team can even quickly update conversations from mobile.

You can add conversations directly from the page showing list of Contacts too. No need to open the contact page to add update and do back & forth.



Filter Records Like Excel

You often want to filter your contacts / companies and see only those that match certain criteria like - of particular geography / industry / user etc. You can create and save such filters. So next time you can filter in 1 click. You can even choose which columns to show.



Task Management: Never Miss an Important Task

In CompanyHub you can create tasks for yourselves and others. Everyday you get a reminder of that day's tasks. You also get a reminder before the actual time of task. You can also delegate tasks to others.

You can also see overdue and upcoming tasks. It is very useful to manage schedule.

Tasks can also be associated with Contacts, Companies, Deals. So when you see a record, you can see associated tasks as well.

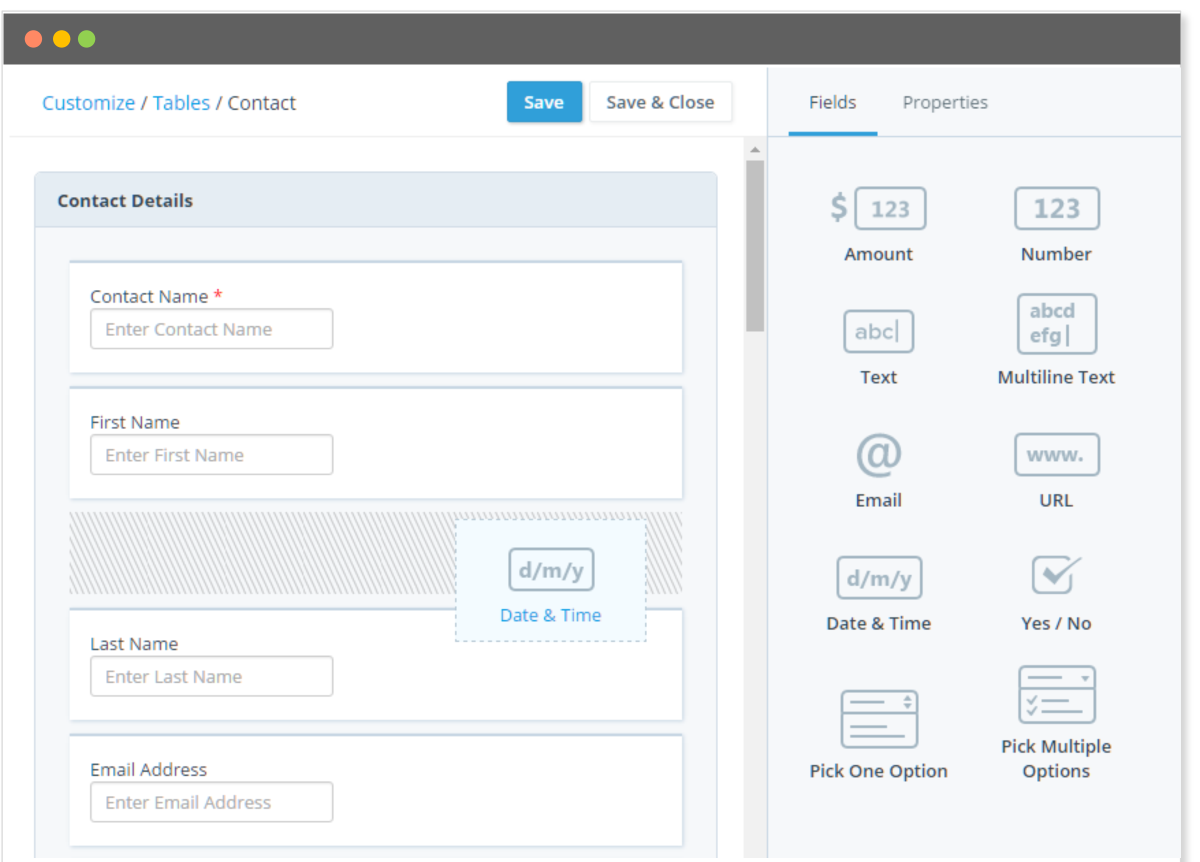
Fully Customizable – Store All The Information You Need

You can easily create custom fields from Admin area (no need of developer / training) with drag – drop and store information like Industry, Size, etc.

It supports different types of fields like Date, Amount, Number, Text, Yes/No, Pick one option etc. You can also associate different records - like associate a deal with a particular contact.

You can do reporting on any custom field as well.

Technical Details : We create separate database for each customer. As you customise, your company database is modified. So it's as powerful as a custom made CRM (at the price of generic CRM!)



CompanyHub Helps You in Every Step of Sales Process

Lead Management

1. Prospecting
2. Followups

Deal Pipeline

3. Requirement
4. Proposal
5. Deal Won/Lost

Quotes & Sales Orders

6. Quote
7. Sales Order

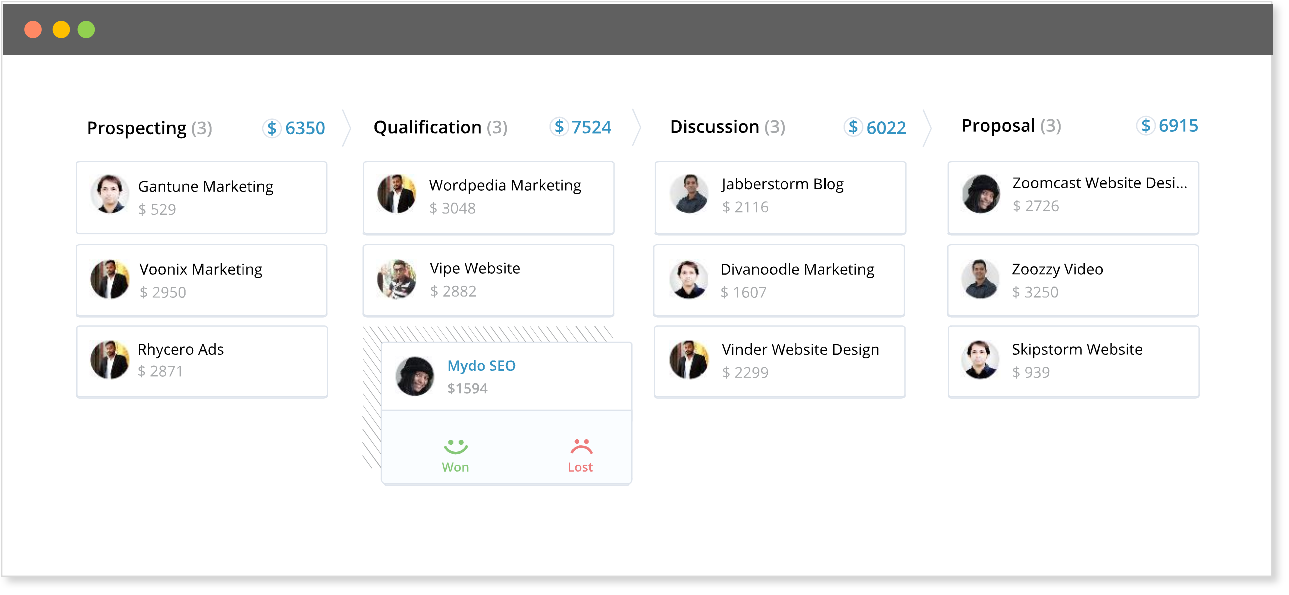
8. Repeat business through followups

Deal Pipeline

You can track enquiries / opportunities from start to end using Deals.

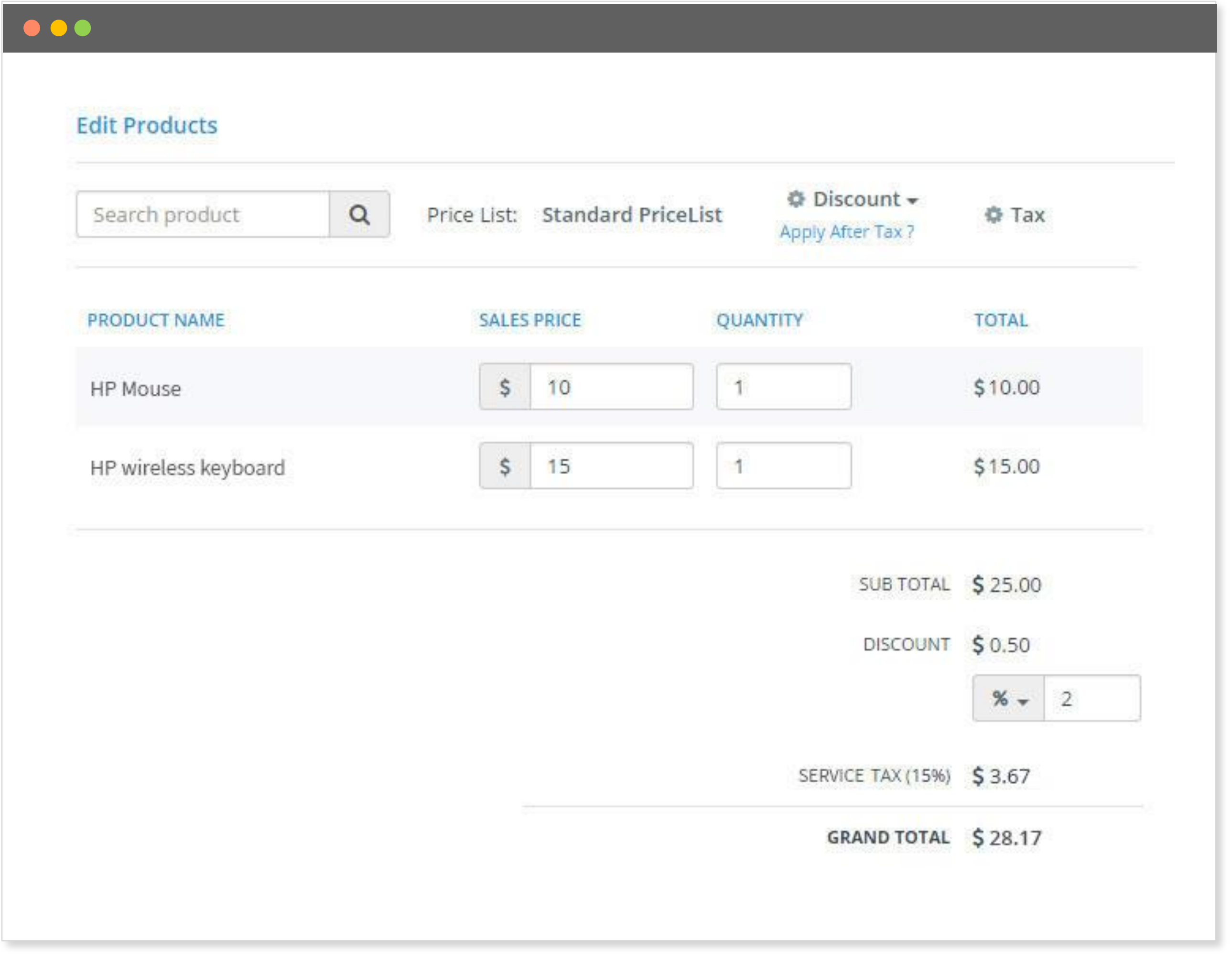
A Deal typically goes through various stages like Enquiry – Estimate - Negotiation etc. before it is won / lost. Deal Pipeline helps you visualize your sales funnel - which deals are there in each stage, who is responsible for each deal, what is the potential amount in each stage etc. This helps you prioritise the deals.

You can customize these stages based on your business process. As a Deal progresses, just drag it to the next stage. When it closes, mark it as won / lost. You can also click on a Deal to see more details.



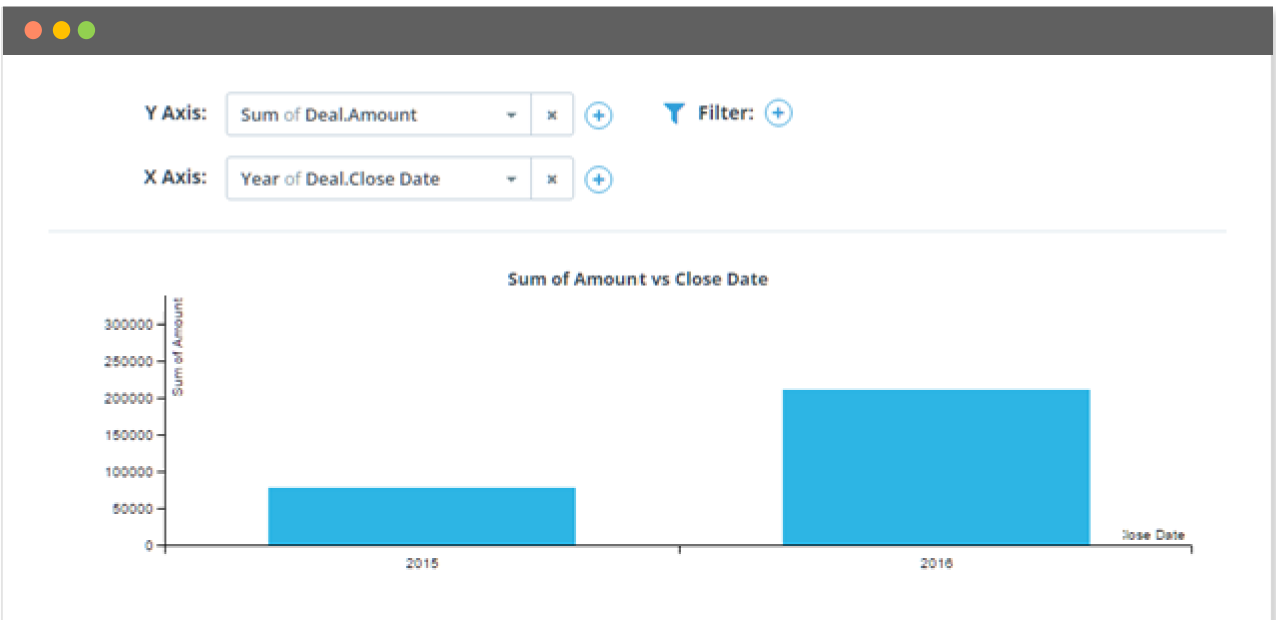
Create Professional Looking Quotes / Orders in Seconds

- ✓ Create pre defined Products, Pricelists and Taxes
- ✓ You can have multiple Pricelists
- ✓ Create Quotes / Orders by just selecting Pricelist, Products
- ✓ Flexible Taxes and Discounts
- ✓ Generate PDF in 1 click
- ✓ See all Quotes & Orders in central place



Create Reports While In Meeting

You need to analyse your business performance from different angles. CompanyHub let's you create almost any report that you need in seconds. You can summarise almost anything - Deals lost, Number of Contacts created, etc. And filter by almost any criteria - particular users / geography / industry, last X months / quarters / years etc.



Pre Defined Reports :

Overall Performance Reports

- Last 3 Quarters Sales
- Pipeline by Stage
- Open Deals Count by Stage
- Last 6 Months Sales
- Deals Won Count - Current vs Last Quarter
- Monthly Sales Report
- Top 5 Deals Won This Quarter

Sales Team Reports

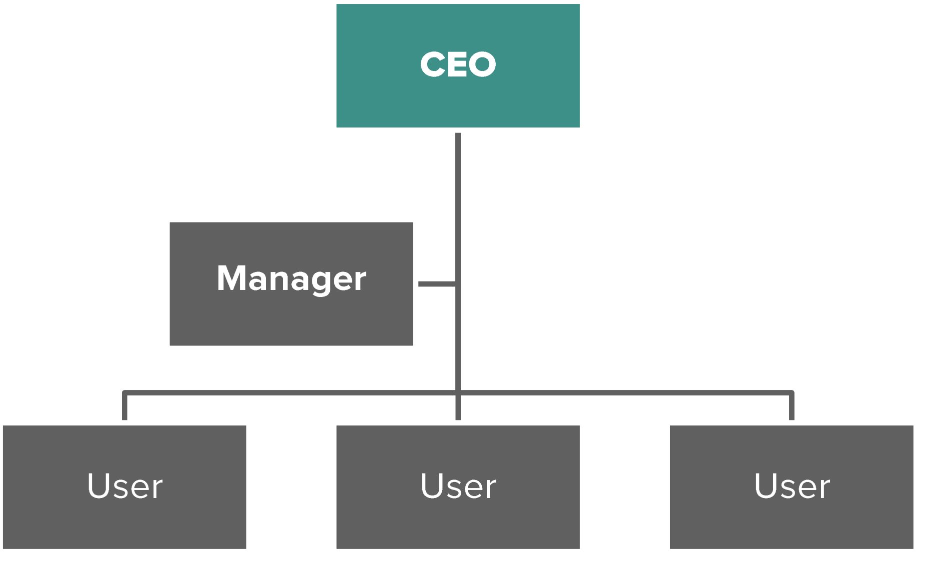
- Top 5 Sales Persons This Quarter
- Top 5 Sales Persons Last 12 Months
- Bottom 5 Sales Persons Last Quarter
- This Quarter Sales by Sales Person
- Last Quarter Sales by Sales Person
- Deals Lost in Last 12 Months by Sales Person

Complete Control on Data Visibility

You can easily control who can see what data. Like a sales person's leads might be only visible to himself and his managers, not to others. Leads of particular region might be only visible to certain users.

You can also hide certain fields from certain users.

So when two users see the same list of records / same report, they will see different data based on what's visible to them.



Its Not Just For Sales – You Can Centralise Other Processes As Well

CompanyHub can be easily customized to manage other processes as well – that too without any code!

How?

Just like you create new excel files / spreadsheets to track different information, you can create new Tables in CompanyHub. Just add whatever fields / columns you need with drag drop. And CompanyHub does everything magically - create pages (in mobile app too), provide reporting, control on who can see etc.

CompanyHub's drag and drop approach for building business applications saves you LOT of money and weeks / months of development time.

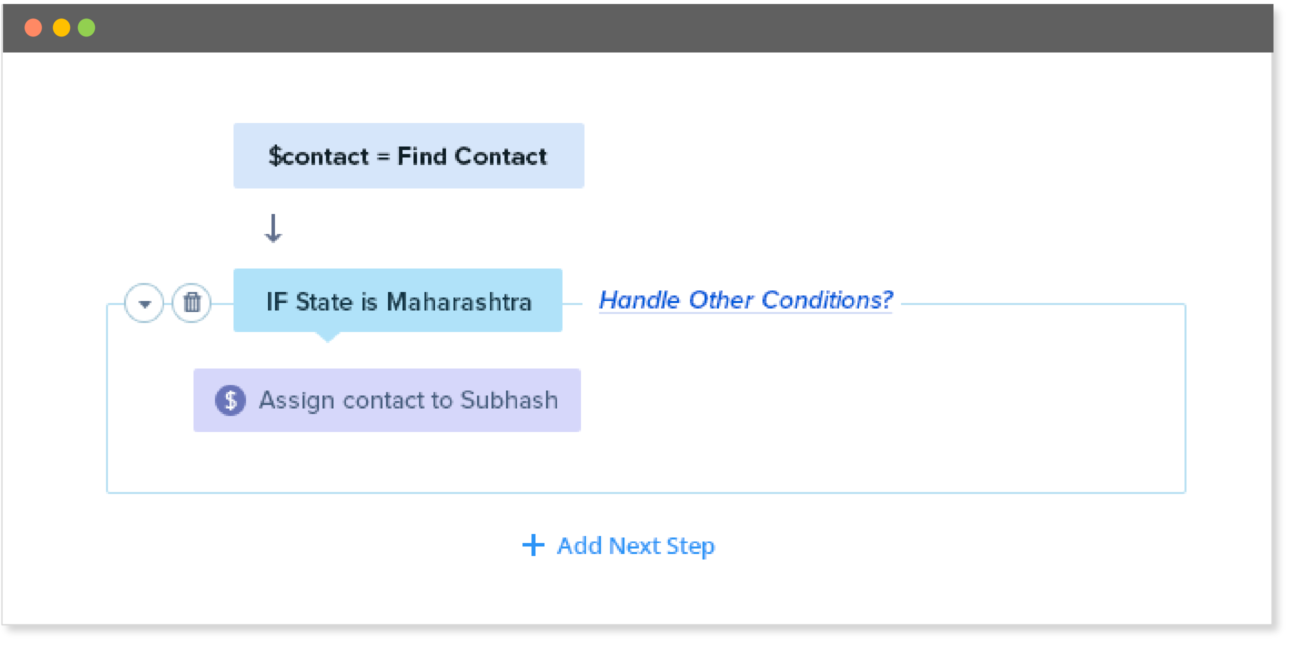
Automation – Coming This April

With CompanyHub you will soon be able to automate almost anything – without writing any code.

Some examples of what you can do:

- ✓ Proactive Alerts like Birthday / Followup reminders
- ✓ Scheduled actions
- ✓ Send Mails based on certain conditions
- ✓ Create tasks based on certain conditions
- ✓ Track progress
- ✓ Do validations
- ✓ Implement business logic on contacts / deals etc.

All this with just drag and drop!



Contact Us

To talk to our CRM Experts or for Demo, call us on

+91 8983980987(India)

Send you queries, comments and suggestions to –

abhishek@companyhub.com