

# ezeecRM

Boost your sales with pleasant  
selling experience!



businesseszee

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High Level Features



ezeecrm USP (Unique Selling Points)



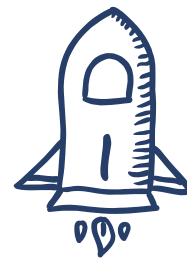
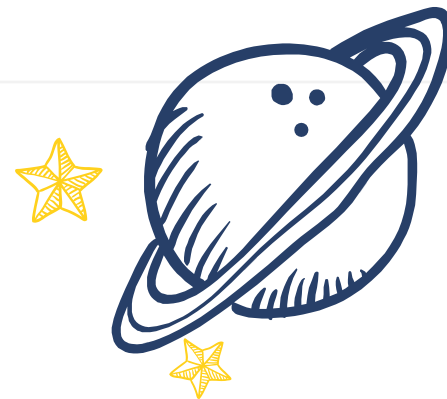
Customers & Testimonials



Pricing

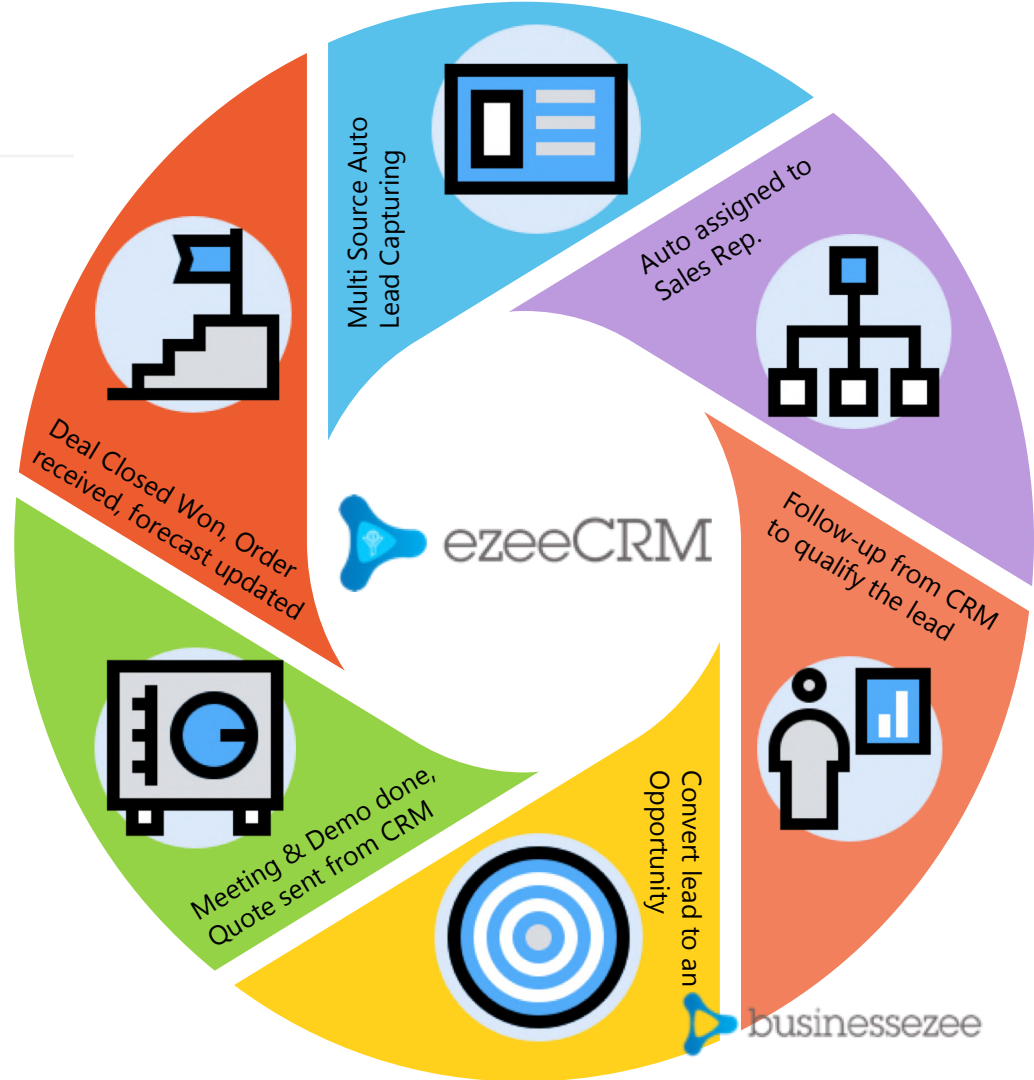


Buying Process



# WHAT IS ezeeCRM?

ezeeCRM is a full fledged Customer Relationship Management Software (CRM). It is a business solution that gives you the ability to connect with & understand real people covering every interaction with valuable customers across your entire business and the process lifecycle, right from lead to the closure.



# WHY CHOOSE ezeecRM?

01

## No Hidden Costs & Contracts

In ezeecRM there is no commitments or forced contracts, there will never be any additional surprise cost. What you pay for is what you get. The pricing is flexible too, you can choose to pay either monthly, quarterly, half yearly or annually.

02

## Security is Primary Concern

When it comes to data security, we understand the trust our customers keep on us. With advanced security features like encryption, audit logs, IP restrictions, ezeecRM protects your data, it only allows access to the users you authorize to login, not even our employee can see your data.

03

## Quick Onboarding & Support

Our premium enterprise support system, makes sure to onboard new customers quickly including the personalised support in data migration and training. you'll have access to a team of highly skilled support engineers during the implementation and even post Go-Live. They can assist you with all your issues, big and small.



# HIGH LEVEL FEATURES?

08

## Reports & Dashboard

Manage the way your business is run with intelligent reporting that breaks down key metrics relating to your sales trends.

06

## Emails, SMS & WhatsApp

When you have everythin related to your customer in CRM why to use external tools for the follow ups! Yes, now send emails, SMS and even WhatsApp from ezeeCRM

04

## Customer 360° View

Now leverage ezeeCRM for getting the 360° view of your customer, all calls, emails, chats, deals, contacts, subscription etc. on single page.

02

## Activities & Follow ups

Now never miss a single follow up by keep track of various sales activities such as tasks, notes, meetings or calls related to your leads or customers.

06

05

04

03

02

01

07

08

## Mobility & Workflow

07

Now be on top of your business even on the go, perform entire CRM operations via mobile Applications, and automate the processes from Workflow feature

## Quotes & Invoices

05

Create a quotation and Invoices in the custom format as per requirements and share the same to your customers from the system itself, have a full visibility of revenue.

## Deals Management

03

Prioritize, track, and monitoring the deals in your pipeline. ezeeCRM deals management gives you everything you need to manage deals across territories and sales structures.

## Lead Management

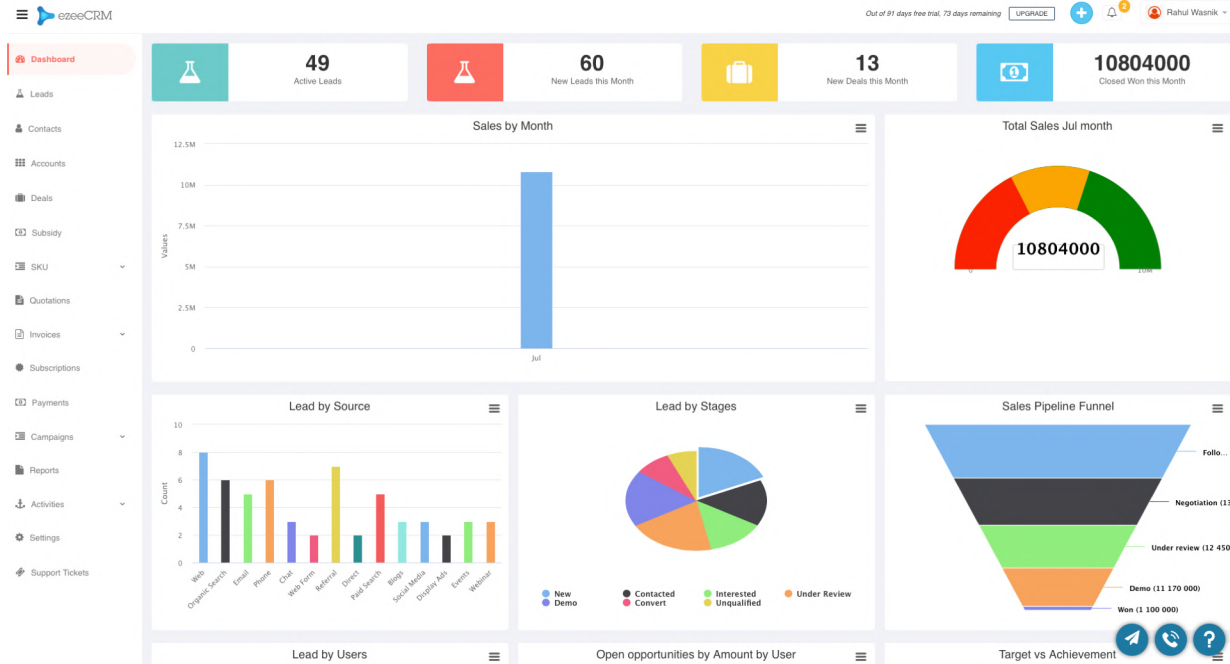
01

Capture, track, manage and follow up to the lead, automate lead scoring and identify the one which will more likely to close.

# YOUR CUSTOM DASHBOARD

Advanced ezeeCRM Dashboard allows the user to have full visibility of your business on the home page.

Let sales and marketing teams make better, data-driven business decisions and increase your sales.



# SIMPLE & FRESH UI

Simplicity is the real beauty of ezeeCRM, Simple yet consistent across the modules and powerful.

User decide what columns he want to see on any module, given maximum control on list view itself.

The screenshot displays the ezeeCRM interface. On the left is a sidebar menu with options: Dashboard, Leads (highlighted), Contacts, Accounts, Deals, Subsidy, SKU, Quotations, Invoices, Subscriptions, Payments, Campaigns, Reports, Activities, Settings, and Support Tickets. The main area is titled 'Leads' and features a table of lead records. At the top right of the main area, there's a status bar indicating 'Out of 91 days free trial. 73 days remaining' with an 'UPGRADE' button, and a user profile for 'Rahul Wazni'.

Below the 'Leads' title, there's a 'Column Visibility' toggle and a search bar. The table has the following columns: NAME, COMPANY NAME, EMAIL, MOBILE, LAST CONTACTED TIME, OWNER, LEAD STAGE, CREATED ON, and ACTION. The table contains 15 rows of lead data, each with a unique name and contact information. The 'LEAD STAGE' column shows various stages like 'Interested', 'New', 'Under Review', 'Contacted', and 'Demo'. The 'ACTION' column provides icons for editing and deleting each lead.

NAME	COMPANY NAME	EMAIL	MOBILE	LAST CONTACTED TIME	OWNER	LEAD STAGE	CREATED ON	ACTION
VANDANA FG	Ndc	vandanam116@gmail.com	9595818649	18-07-2020 12:37 PM	Rahul Wazni	Interested	14-07-2020 8:26 PM	[Edit] [Delete]
Vaibhav Deshpande	TBS	vaibhavedshpande@gmail.com	9970180147	16-07-2020 11:42 AM	Rahul Wazni	New	11-07-2020 7:36 PM	[Edit] [Delete]
Shelly Paul	Squad Help	Not Available	Not Available	Not Available	Rahul Wazni	New	09-07-2020 10:59 AM	[Edit] [Delete]
Shelly Paul	Squad Help	shellypaul01@squadhelp.com	8668301020	11-07-2020 10:48 AM	Samarth Noriya	Interested	09-07-2020 10:54 AM	[Edit] [Delete]
Ethan Gavin	GoPro	Ethan@domain.com	1122556644	11-07-2020 10:49 AM	Rohit Ratnaparkhi	Demo	01-07-2020 3:41 PM	[Edit] [Delete]
Ramla Ramsey	RSA Insurance Group Plc	ramla@example.com	4638239547	11-07-2020 10:50 AM	Rahul Wazni	Under Review	01-07-2020 3:39 PM	[Edit] [Delete]
Samuel James	Elanex	Samuel@domain.com	4461897877	Not Available	Rahul Wazni	Under Review	01-07-2020 3:37 PM	[Edit] [Delete]
Nora Brown	Fitbit	Nora@domain.com	1122556644	01-07-2020 3:38 PM	Rahul Wazni	Contacted	01-07-2020 3:34 PM	[Edit] [Delete]
Lia Misa	Lia Inc	Lia@domain.com	8484928876	05-07-2020 12:45 PM	Rahul Wazni	Under Review	01-07-2020 3:32 PM	[Edit] [Delete]
Sophia Harper	Cloudera	rajendra@percepts.com	2322564489	Not Available	Rahul Wazni	New	01-07-2020 3:31 PM	[Edit] [Delete]
Owen Dexter	Dexter Inc	Owen@domain.com	8451885545	Not Available	Rahul Wazni	New	01-07-2020 3:29 PM	[Edit] [Delete]
Henry Isaac	City National Bank	Henry@domain.com	2255664411	Not Available	Rahul Wazni	Under Review	01-07-2020 3:27 PM	[Edit] [Delete]
Liam William	Cisco Systems	Liam@domain.com	2121121215	13-07-2020 4:30 PM	Rahul Wazni	Demo	01-07-2020 3:26 PM	[Edit] [Delete]
Madison Olivia	Century Theatres	Madison@domain.com	1122556644	Not Available	Rahul Wazni	Convert	01-07-2020 3:24 PM	[Edit] [Delete]
Gabriel Lucas	BAX Global	Gabriel@domain.com	1122556644	Not Available	Rahul Wazni	Under Review	01-07-2020 3:22 PM	[Edit] [Delete]
Matthew Grayson	Amgen	Matthew@domain.com	55556451328	Not Available	Rahul Wazni	Demo	01-07-2020 3:20 PM	[Edit] [Delete]

# CUSTOMER 360° VIEW

Access all your customer details, deliverables actions and interactions at one single page.

ezeeCRM provides you with an end-to-end picture of all your customers through their different journeys

The screenshot displays the 'View Lead' page for Stela Johnson, a Project Manager at Morgan Sindall Group Plc. The interface is divided into several sections:

- Left Sidebar:** A vertical navigation menu with icons for various actions like adding notes, calls, and files, each accompanied by a timestamp (e.g., '18 days ago').
- Lead Profile:** Displays the lead's name, title, company, location (Rohini, Delhi, India), and a 'View Lead' button.
- Lead Status Progress:** A horizontal timeline showing the lead's journey through stages: New, Connected, Interested (current), Under Review, Demo, and Con... (Completed). A callout points to this section with the text 'Lead status progress'.
- Social Media profile connections:** A row of icons for Facebook, Twitter, LinkedIn, and Instagram, with a callout pointing to them.
- Options to log, Notes, Tasks, Meetings, Documents:** A row of icons for logging activities, with a callout pointing to them.
- Send email & WhatsApp:** A button in the top right corner with a callout pointing to it.
- Lead Details:** A table of contact information including email (stela@example.com), work status (Not Available), owner (Kuldeep Sahane), mobile (3421675431), address (83 Victoria St, East Maitland, NSW 2323), zipcode (2323), company website (Not Available), and description (Not Available).
- Recent Conversations:** A list of recent interactions, including manual call logs and notes, with timestamps (e.g., '4 days ago', '6 days ago').
- Notes:** A section on the right side containing a list of notes, such as 'Discussed on the site visit, need to call tomorrow' and 'chase for requirement', each with a timestamp.

# SELL ON THE GO USING MOBILE APP

Manage all the customers activities on your finger tips using mobile CRM, available on Android & iOS.

Stay on top of your business wherever you go with ezeecrm mobile apps



# USP OF ezeecRM?



# SOME OF VALUED CUSTOMERS?



**Kotak**  
Kotak Mahindra Bank



**Mahindra**  
LOGISTICS



181 WOMEN HELPLINE

**EQUIFAX®**



**VIOLA**



**pigeon**

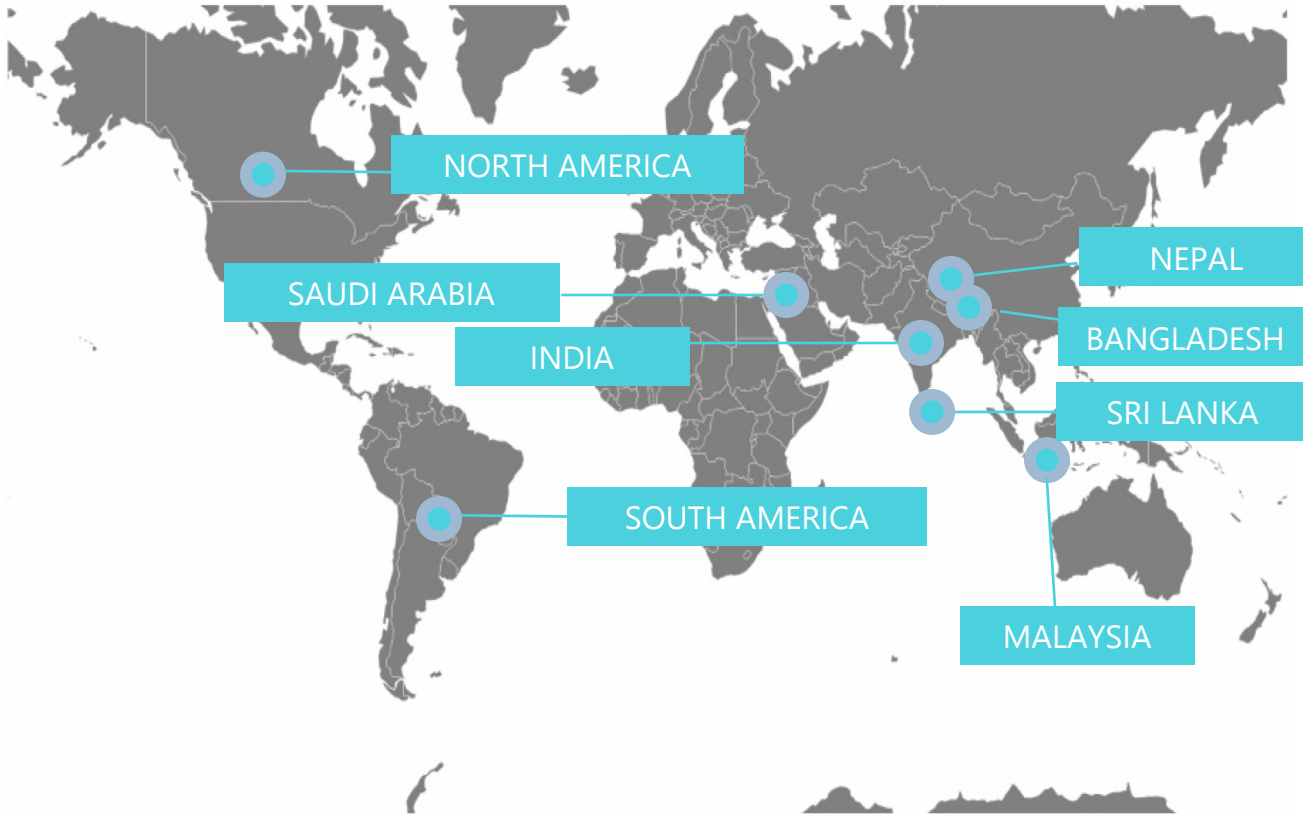
**livfin**

**DSP**  
MUTUAL FUND

**TATA**  
MUTUAL  
FUND

**ID TECH**  
IDENTITY AND SECURITY

# GLOBAL MARKET PRESENCE?



Nationwide network of numerous small medium and large size customers.

1000 + Customers | 100 + Team Members | 10,000 + Users

# ezeeCRM PRICING

Most Favourite

	SEED ₹ 600 user / month, billed Annually	SAPLING ₹ 800 user / month, billed Annually	PLANT ₹ 1200 user / month, billed Annually	TREE ₹ 1400 user / month, billed Annually
Standard Sales Automation	✓	✓	✓	✓
Mobility & Security	✓	✓	✓	✓
Follow ups: Emails, SMS, Tasks	✓	✓	✓	✓
Configurations & Integrations Workflow, Team & Rules	✗	✓	✓	✓
Social Media Integration, Advanced Configurations	✗	✗	✓	✓
IP Whitelisting, Dedicated Account Manager	✗	✗	✗	✓

Many more features are there in the above plan, to see them please visit our website\*

# SUBSCRIPTION PROCESS

1

## SIGN UP FOR FREE TRIAL

Visit to <https://businesszee.com/ezeecrm> and sign up for the free trial which is valid till 7 days to play around the system

2

## UPGRADE THE TRIAL

Once you are satisfied with the free trial, click on the upgrade button situated on top of the ezeecrm Trial Account for initiate the purchase process

3

## SELECT THE RIGHT PLAN

We have 4 plans with different set of features, select the one meeting your requirements and also select the payment frequency i.e. Monthly, Quarterly, Half Yearly and Annually. Per month cost is different as per the frequency selected

3

## CHECK OUT FOR PAYMENT

After initiating the payment process, mention the number of users and verify your Company, plan & this payment will be the recurring one if you do this using your credit card.



On a Mission to Grow Your Business  
Thank You!

