



# BPM'ONLINE

# EXTENDED PROFILE



## OVERVIEW

bpm'online is a process-driven, cloud-based CRM solution for marketing, sales and service automation. It is in use across a number of industries including advertising, retail, financial services, logistics, legal and pharmaceuticals.

bpm'online is designed for sales, marketing, and customer service teams. The system allows users to align marketing, sales, and service on a single CRM platform. Whilst the software is ready to use out of the box, it is also flexible and highly customizable.

A key feature of bpm'online is the ability it affords business users to build their own applications, via a drag and drop interface based on the BPMN standard. This allows non-technical sales staff and business analysts to change processes in the CRM to suit their business requirements. One of the key features of the bpm'online sales module is its engaging interface that allows users to see a 360° customer view of the sales process. It also incorporates forecasting, leading and opportunity management and reporting.

bpm'online is available in three packages, each designed for businesses of different sizes; Team, Commerce, and Enterprise. The sales, marketing, and service modules are available separately or as a single, integrated bundle. bpm' online pricing is based on a per-user, per month basis whilst the cost of implementation is calculated separately.

## FEATURE OVERVIEW

## SOFTWARE SPECIFICATION

<b>OVERVIEW</b>	
PRODUCT NAME	bpm'online
<b>SOFTWARE FEATURES</b>	
API ACCESS	✓
CADENCE	✓
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✓
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✓
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✓
SALES GAMIFICATION	✓
QUOTATION HANDLING	✓

TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✓
<b>SUPPLEMENTARY FEATURES</b>	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓
<b>CUSTOMER SIZE</b>	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
<b>OTHER FEATURES</b>	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✓
CUSTOMIZABLE	✓
<b>MOBILE FEATURES</b>	
IOS APP	✓
ANDROID APP	✓
NATIVE WEB APP	✓
<b>HOSTING METHOD</b>	

CLOUD	✓
ON-PREMISE	✓
<b>FURTHER INFORMATION</b>	
PRICING	Starts from \$25 Per user / month
IMPLEMENTATION TIMEFRAME	Depending on complexity: From several days to few months


## SOFTWARE SCREENSHOTS

- Menu
- Processes
- Notifications
- Leads
- Accounts
- Contacts**
- Activities
- Opportunities
- Documents
- Invoices
- Knowledge Base

### Contact




What can I do for you? GO

Edit Actions ▾ Go To ▾ View ▾ ◀ ▶

 **John Best**  
ITbiz Asset Management  
Executive Director

**COMMUNICATION OPTIONS** ^

E-mail	j.best@itbiz.com
Phone	+44 (20) 3447 3830
Mobile Phone	+44 (772) 225 6585
Skype	j.best

Do not contact by mobile phone

Do not contact by Email

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**NOTEWORTHY EVENTS** ^

Birthday	12/04/1983
Company foundation day	04/10/2003

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**NOTES** ^

Hobbies: sports. Favorite sport – hockey

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**HISTORY** ▾

**ACTIVITIES** ^

 Follow up call to discuss activities for the

### dashboards

What can I do for you?  GO

Sales

- Dashboards
- Feed
- Leads
- Accounts
- Contacts
- Activities
- Opportunities
- Orders
- Invoices
- Documents
- Products
- Projects

**Top 5 Sales Reps by Paid Invoices**

John Best	144,640.00
Symon Clarke	78,555.00
Mary King	25,010.00
Regina V. Cook	0.00
Jason Robinson	0.00

**Top 5 Sales Reps by Opportunity Amount**

John Best	130,970.00
Mary King	33,950.00
Symon Clarke	27,560.00
Megan Lewis	20,945.00
Heide Moore	1,275.00

**Best Sale**: \$ 17,200

**Average Number of Meetings**: 13

**Average Number of Calls**: 16

**Top 5 Sales Reps by Number of Meetings**

John Best	13
Symon Clarke	2
Valerie E. Murphy	2
Regina V. Cook	0
Jason Robinson	0

**Top 5 Sales Reps by Number of Calls**

John Best	9
Valerie E. Murphy	4
Megan Lewis	3
Regina V. Cook	0
Jason Robinson	0

### Agent home

What can I do for you?  GO

Cases

**Case 103**  
 Status: In progress  
 Resolution time: 02/22/2015 14:40  
 Contact: Carmen Smith

**Case 202**  
 Status: In progress  
 Resolution time: 02/21/2015 12:00  
 Contact: Ted Balken

**Case 198**  
 Status: Resolved  
 Resolution time: 02/20/2015 11:30  
 Contact: John Weich

**Case 197**  
 Status: In progress  
 Resolution time: 02/18/2015 12:00  
 Contact: Mary Brown

**Case 196**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 195**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 194**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 193**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 192**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 191**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 190**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 189**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 188**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 187**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 186**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 185**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 184**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 183**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 182**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 181**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

**Case 180**  
 Status: Resolved  
 Resolution time: 02/18/2015 12:00  
 Contact: John Weich

### 1 My KPIs

Cases registered today: 24

Cases resolved today: 20

Average time to resolve the case: 3.5

Satisfaction rate: 4.6

### Opportunities

What can I do for you?  GO

OPPORTUNITY ANALYTICS

**Invoice payment dynamics**

Pending payments this month: 334,211

Pending invoices total: 140,843

Revenue this month: 455,789

**Top 10 opportunities to close**

003 / Avion / Package	Avion	Mary King	12,000.00
009 / Streamline Development / Sale of Goods	Streamline Development	John Best	11,000.00
004 / Factorial Services / Package	Factorial Services	Jason Robinson	10,000.00
004 / Brenda Lynn / Package	Brenda Lynn	John Best	4,500.00
000 / Andrew S. Barber / Sale of Goods	Infocom	Mary Valerie	2,900.00
002 / Alpha Business / Sale of Services	Alpha Business	Symon Clarke	1,300.00

**New opportunities by category**

4-2016: 84,400

5-2016: 84,100

4-2016: 12,200

5-2016: 21,500

1,275

### Campaign

What can I do for you?  GO

bpmonline

**bpmonline Networking Day**

Status: Completed

Participants: 138

Reached the goal: 75

Goal reached!

1 month 45.0% of participants to visit the event

**Campaign workflow**

Registration → Thanks → 10 days → opened → Presentation → Reminder → closed → Follow-up Day → participated → Reached the goal

**Tools**

- Registration
- Thanks
- 10 days
- opened
- Presentation
- Reminder
- closed
- Follow-up Day
- participated
- Reached the goal
- Deleted the camp

**Feed**

Bulk email: Thanks

Bulk email: Thanks for registering on ha...

Send: Thank you for registering o...

Sender's name: bpmonline\_uk

Sender's email: info@bpmonline.com