



SOFFRONT CRM

EXTENDED PROFILE



OVERVIEW

Sofffront CRM is a customizable system that aims to automate the sales, service and project aspects of small to mid-sized businesses.

Sofffront CRM is suitable for sales teams aiming to speed up lead conversions and optimize their sales processes. The CRM is highly modifiable and comes equipped with intuitive drag and drop customization tools that allow non-technical users to develop solutions to meet the needs of an organization's processes and workflow.

One of Sofffront CRM's key packages is an auto-generated task list that sets out a salesperson's upcoming day. This feature allows users to drill down on tasks and subtasks to look up lead information and mark off tasks as completed as they progress through their day. Quotations can also be generated in the system and sent out to customers on company headed documents.

Sofffront CRM is offered with a dedicated implementation plan whereby a Sofffront expert is assigned to a client in order to minimize costs and tailor the implementation. The CRM solution is modular, meaning customers only pay for the functionality they require.

SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Soffront CRM
SOFTWARE FEATURES	
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	✗
SUPPLEMENTARY FEATURES	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✗
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✗
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✓
ANDROID APP	✓
NATIVE WEB APP	✗
HOSTING METHOD	

CLOUD	✓
ON-PREMISE	✗
FURTHER INFORMATION	
IMPLEMENTATION TIMEFRAME	1 Week
PRICING	\$35 per user / month

SOFTWARE SCREENSHOTS

The screenshot displays the Soffront CRM interface for a contact named Pat Miller. The interface includes a top navigation bar with tabs for 'Home' and 'Pat Miller'. Below this is a blue header with the contact's name, a profile icon, and action buttons: Refresh, Edit, Delete, Copy, Groups, and Map. A breadcrumb trail shows the contact's status: Suspect > Lead > Prospect > Opportunity > Customer. On the left, a sidebar shows social media icons (Twitter, Facebook, Google+) and a star rating of 25. The main content area has tabs for Notes, Contacts, Opportunities, and Attachments. The Notes tab is active, showing a list of four notes with a search bar and pagination (1-4 of 4). The notes are as follows:

- System, 05/22/16 11:57 PM, Note**
Visited <http://www.soffront.com/online-crm-pricing>.
- System, 01/29/16 01:51 AM, Note**
Visited <http://www.soffront.com>
- System, 01/29/16 01:45 AM, Note**
Opened the message "Week 1" of the touch campaign "Proven to Profit eBook download".
- System, 01/20/16 10:50 AM, Note , Note**
Submitted the "Proven to Profit" Web form.

On the left sidebar, the contact details are:

- Name: Pat Miller
- Email: pat@company.com
- Phone: 888-888-8888
- Source: Web
- Industry: Service
- State: CA

Home Accounts Pat Miller

Pat Miller

Refresh Edit Delete Copy Groups Map

Support > Call Pat Miller

Call +1-510-413-9000

Call

Groups

1-6 of 6

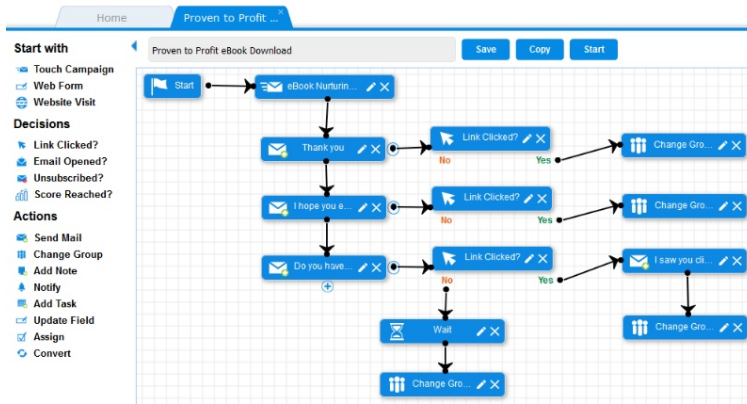
Name: Pat Miller
 Email: pat@company.com
 Phone: 510-413-9000
 Mobile:
 Source:
 Web:
 Industry:
 SERVICE:
 State:
 CA
 Sales rep: Sudipto Ghosh
 Country:
 USA

Sudipto Ghosh, 05/26/16 10:24 AM, Task
 Let a VM
 Dialed 5104139000. Call Duration: 23 secs.
[Listen to the recording](#)

Sudipto Ghosh, 05/24/16 11:59 PM, Appointment
 Spoke with Pat about our next appt
 Dialed 5104139000. Call Duration: 45 secs.

Sudipto Ghosh, 05/22/16 11:57 PM, Note
 Visited http://www.softfront.com/online-crm-pricing.

Sudipto Ghosh, 01/29/13 01:51 AM, Note
 Visited http://www.softfront.com



Home Accounts Pat Miller

Pat Miller

Refresh Edit Delete Copy Groups Map Assign Share Workflow Audit Print

Support > Lead > Prospect > Opportunity > Customer

Tasks and Appointments

Pat Miller

Refresh Edit Delete Copy Groups Map

1-6 of 6

Name: Pat Miller
 Email: pat@company.com
 Phone: 510-413-9000
 Mobile:
 Source:
 Web:
 Industry:
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 State:
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Sudipto Ghosh

Opportunities Stages	Close (10%)	Negotiation (2%)	Proposal (8%)	Budgeted (3%)	Qualified (2%)	Total
Total: This Quarter	\$34,000.00	\$7,000.00	\$19,000.00	\$8,750.00	\$2,500.00	\$132,000.00
Jul 2016	\$34,000.00	\$7,000.00	\$19,000.00	\$8,750.00	\$2,500.00	\$69,250.00
Sudipto Ghosh	\$30,000.00	\$7,000.00	\$9,000.00	\$8,750.00	\$0.00	\$46,750.00
John Johnson	\$4,000.00	\$0.00	\$10,000.00	\$0.00	\$0.00	\$14,000.00
Pat Miller	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Aug 2016	\$0.00	\$0.00	\$0.00	\$12,250.00	\$27,500.00	\$46,750.00
Sudipto Ghosh	\$0.00	\$0.00	\$0.00	\$12,250.00	\$17,500.00	\$31,750.00
John Johnson	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	\$15,000.00
Pat Miller	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sep 2016	\$0.00	\$0.00	\$0.00	\$0.00	\$26,000.00	\$26,000.00
Sudipto Ghosh	\$0.00	\$0.00	\$0.00	\$0.00	\$26,000.00	\$26,000.00
John Johnson	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Pat Miller	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Home Accounts

Recent Accounts Status All (3) Lead (1) Prospect (2)

+ Add Refresh Setup First name Type a keyword and press enter

Lead Score	First name	Last name	Email	Source	TStatus	Notes Details (Text)
★★★★☆ 20	Pat	Miller	pat@company.com	Web	Lead	Submitted the "Proven to Profit" Web form.
★★★★☆ 35	Susan	Smith	susan@big.com	Trade show	Prospect	Converted from Lead to Prospect
★★★★☆ 25	Ron	Jackson	ron@bcd.com	Email Campaign	Prospect	Called and left VM