



OPENCRM

EXTENDED PROFILE



OVERVIEW

OpenCRM is designed with mid-market businesses in mind and provides clients with a complete solution, avoiding the pain of bolting on expensive extras halfway through their CRM journey.

Offered as a cloud-based solution, OpenCRM can operate on desktop, tablet, and mobile devices.

Full integration is at the heart of the software's design, making it ideal for firms looking to manage opportunities, sales, invoicing, customer service, and projects all in one place. A dedicated team of consultants help clients scope out their requirements and virtual training is provided with every package (or on-site if required).

Also included with every subscription is our UK based customer service team, who consistently maintain a "great" rating for 95% of interactions with our clients.

Powerful customer service and project management tools accompany the usual sales and contact management features, allowing users to seamlessly integrate invoicing, credit controls, and account management. As a result, the entire sales process can be almost entirely automated; quotations, sales orders, and commissions can all be managed within OpenCRM without the need for third-party software.

OpenCRM also offer bespoke development, for businesses that require additional features that aren't available out of the box.

FEATURE OVERVIEW



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	OpenCRM
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	
PRICING	£33/month per user. Including all system features and great customer service

SOFTWARE SCREENSHOTS

Super User . ▼

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 68%

Tuesday 20th August

⏪ ⏩ TODAY
📍 DAY | 5 DAYS | WEEK | MONTH

20 Aug 2019

08:00					
09:00	Blog Entry Jon Fairclough				
10:00	Check outstanding delegated tickets Super User .	Arrange initial meeting Super User .			
11:00					
12:00	Comment: Administrator	Department Meeting Jon Fairclough 12:00 - 13:00 <small>Not Started</small>	Department Meeting Assigned Users: Jon Fairclough 12:00 - 13:00 Not Started		
13:00	Conference Call HM Supplies Administrator 12:30 - 13:30 <small>Not Started</small>	Department Meeting Maggie Burgess 13:00 - 14:00 <small>Not Started</small>	Not Started		
14:00	Marketing Meeting Super User . 14:00 - 16:00 Not Started				
15:00		Department Meeting Super User . 14:51 - 15:51 <small>Not Started</small>		Department Meeting Geoff Peacock 14:52 - 15:52 <small>Not Started</small>	
16:00					
17:00					

⏪ August 2019 ⏩

Mon	Tue	Wed	Thu	Fri	Sat	Sun
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Tasks ⊖

Subject	Contact Name	Start Date	Assigned To	Duration	Status
☉ Check outstanding delegated tickets ☉		20-08-2019 10:30	Super User .	0h 05m	Not Started edit
☉ Blog Entry		20-08-2019 09:30	Jon Fairclough	0h 10m	Not Started edit
☉ Blog Entry		19-08-2019 09:30	Jon Fairclough	0h 10m	In Progress edit
☉ Proposal for case study		18-08-2019 16:15	Super User .	0h 30m	Not Started edit

opencrm Name, company, keyword...

Good Afternoon Super User

Switch to one column view

Pipeline by Stage/User

Click and drag to move

Click and drag to move

All Opportunities By Lead Source

Shows cumulative opportunity amounts by selected lead source for selected users

Click and drag to move

Opportunities by user

Start Date: 11/01/2014 End Date: 12/31/2014 User: SuperAdmin

Company: All

Click and drag to move

Pipeline By Month By Outcome

Start Date: 11/01/2014 End Date: 12/31/2014 User: SuperAdmin

Company: All

opencrm Name, company, keyword...

Good Afternoon Super User

Leads: Home

Recent | Lead Type 1 | Lead Type 2

Keyword: Filter Search All Clear

View: Hot Leads

New Lead Delete Email Convert Merge Activity Mail Merge Show Map

Showing 1 - 15 of 15

First Name	Last Name	Company	Lead Source	Website	Activity
Theresa	Lutshon	CCR Group	Web Site	www.CCR.co.uk	edit del
Clarice	Jackson	Light Switch Telecom	Cold Cal	www.lightswitchtelecom.com	edit del
Bill	Crooks	Cryptic Solutions	Web Site	www.crypticsolutions.co.uk	edit del
Tim	Smith	Wisdom Engineering	Conference	www.wis-eng.co.uk	edit del
Scott	Hairthorpe	LCC Telecommunications	Web Site	www.LCC.co.uk	edit del
Philip	Karlsson	CRW Cars	Web Site	www.CRW.co.uk	edit del
Jessica	Horsfield	Epic Entertainment	Trade Show	www.epicentertainment.co.uk	edit del
Jan	Schneiderien	Schneiderien Versicherung	Web Site	www.SV.de	edit del

opencrm Name, company, keyword...

Good Afternoon Super User

HelpDesk: Home

Keyword: Filter Search All Clear

Status:

In Progress 10

Needs Action 10

On Hold 10

Wait For Response Closed 10

Hot Ticket 10

New Ticket Delete Change Owner Change Status Merge

View: Open Tickets

Showing 1 - 17 of 17

Title	Assigned To	Contact Name	Related To	Priority	Severity	Status	Last Action Date	Action
Printer Not Responding	Super User			3 Standard	3 Medium	In Progress	2014-09-25 15:26	edit del
Printer Bug	Robert Miles	Robert Miles	Print Site	3 Standard	3 Medium	In Progress	2014-09-25 15:26	edit del
SQL query execution	Sally James	Jake Adams	Adaptive Systems	3 Standard	4 High To	On Hold	2014-09-25 15:26	edit del