

Vtiger CRM Development

Vtiger CRM

is a web-based Open Source Customer Relationship Management solution for small and medium businesses.

Vtiger CRM provides many enterprise features, such as Sales Force Automation, Help Desk, Desk, Products, Vendors, Price Books, Sales Quotes, Orders, Invoices, Reports & Dashboards, Security Management, RSS, Product Customization, and others but with ease of use and administration making it suitable for small and medium businesses (SMB).

Vtiger CRM provides essential business productivity enhancement utilities for Microsoft® Outlook®, Mozilla/Thunderbird E-mail client, Microsoft® Word®, Customer Self Service Portal, and Web Forms as an open source projects. These add-ons increase productivity while allowing you to customise your workflow using the tools your business is comfortable with.

Key Benefits

- Very easy to use
- Integration with Microsoft Outlook & Microsoft Word
- Integration with Mozilla Firefox & Thunderbird
- Customer Portal
- Helpdesk
- Rich user-experience with product customization
- Web based & cross platform
- Product & Inventory management
- Sales Force & Marketing automation

Major Features of Vtiger CRM

Manage leads, accounts, contacts, and opportunities

- Import data from external sources, such as Web downloads, tradeshow, seminars, and direct mail
- Export data to spreadsheet software, such as Microsoft® Excel®, OpenOffice®, and others to analyze the sales pipeline and quickly identify the bottlenecks if any
- Associate customer records with other records in the system for a better 360 degrees view of the customer record
- Attach customer-specific documents to the customer details for a quick reference in future

Help Desk

- Manage trouble tickets end-to-end
- Notify status of the trouble tickets to the customers
- Track complete history of the trouble tickets
- Create frequently asked questions
- Integrated Customer Self Service Portal with Help Desk
- Statistics of the trouble tickets for a better ticket management

Inventory Management

- Manage organization-wide product life cycle end-to-end
- Create different price books for products based on customer segments
- Procure products from the selected list of vendors
- Complete the sales management cycle with an integrated Quotations, Order processing, and Invoicing system

E-mail Integration

- Fetch inbound E-mails and associate to the existing contacts
- Manage mailing lists and execute HTML based mass E-mail campaigns
- Send mass E-mails to the contacts and other users

Reports & Dashboards

- Fully customizable reports for all the modules
- Sales pipeline analysis by sales stage
- Monthly Sales pipeline analysis
- Sales opportunities by lead source
- Drill-down the dashboards by time and opportunity stage

Security Management

- Manage user profiles and field-level access to the users
- Create team roles as per your organization structure
- Control the access to modules according to the user's roles

- Archive the login history of each user for better auditing

Product Customization

- Add custom fields in all the modules, such as text, number, currency, pick lists, and others as per your business requirements
- Customize tabs using drag & drop so that modules that are not relevant to sales process can be hidden
- Change the look and feel of the user interface

vtiger Outlook Plug-in

- Add outbound and forward inbound Outlook E-mails to vtiger CRM
- Synchronize contacts between Microsoft® Outlook® and vtiger CRM
- Resolve conflicts while synchronizing contacts between Microsoft® Outlook® and vtiger CRM
- Synchronize tasks and calendar between Microsoft® Outlook® and vtiger CRM
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