



CRM

2016 objectives:
-up to 40 ROI
-54 growing



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2021 CRM CATALOGUE

INFORMATION
COMMUNICATION
TECHNOLOGY

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CRM OVERVIEW



Customer Relationship Management is a strategy that companies use to manage interactions with customers and potential customers. CRM helps organizations streamline processes, build customer relationships, increase sales, improve customer service, and increase profitability.

ONCE-OFF: R13999.00

If hosted with 1 Up Tech, monthly hosting fees are as follow:

- 5 Users | R1200.00 per month
- 10 Users | R1800.00 per month
- 20 Users | R3600.00 per month
- Unlimited Users | R4999.00 per month

Customer Relationship Management Software

Full List of Features

Client management

Client management is essential for any business, now it can be done all in one location.

- CRM (Customer Relationship Management Software)
- Quotes and invoices
- Proposals
- Product catalog
- Email marketing
- Virtual call center
- Sales automation
- and more

Project management

Create and track your challenging projects over a short or long period all in one place.

- To-do lists
- Charts and graphs
- Unlimited subtasks
- Workload planning and management
- Checklists with reminders
- Task reports
- and more



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CUSTOMER RELATIONSHIP
MANAGEMENT

Communications

It's all tied to social media of course.

- Social network
- Group chat
- Video conferencing
- Mobile messenger
- Online telephony
- Email server
- and more

Workforce management

Workforce management can be tough to keep track of without the correct tools, well this CRM has just about all those tools.

- Clock in and Clock out
- Work reports
- Company directory
- Absence calendar
- Leave requests
- Shared calendars
- HRMS
- and more

Overview of Awesome CRM features

- Manage and invoice projects.
- Link tasks to CRM features and stay organized.
- Powerful support system.
- Track time spent on tasks.
- Auto import leads.
- Keep track of leads.
- Create professional proposals.
- Record expenses.
- Create announcements for staff and customers.
- Paypal and Stripe payments.
- Follow-ups, reports, files, and many more features.

● CRM MODULES

***The CRM standalone is required.**

ADDITIONAL CRM MODULES

Accounting and Bookkeeping Module

This module offers the ability to automate many processes which will not only save time but will ensure accuracy and efficiency with financial reports.

- Chart of accounts
- Journal entries
- Transactions
- Reconciliations
- Transfer accounts
- Bank statements
- Budget management
- Profit and loss
- Balance sheets
- General ledger
- Trial balance
- Statement of cash flows
- Cheque detail
- Accounts receivable aging
- Accounts payable aging

Price: R2999.00

Timesheets and Leave Module

Easily track working hours, project hours, and absences.

- Check-in/out manually
- Project timesheets
- Geolocations
- Attendance devices
- Leave management
- Workshift management
- Workplace
- Route planner
- Route maps
- Route point management

Price: R2499.00



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ADDITIONAL CRM MODULES

Spreadsheets Online Module

A powerful spreadsheet editor like Excel, viewable amongst staff members.

- Individual folders
- Shared folders
- Share spreadsheets to platforms

Price: **R2499.00**

Human Resources Management Module

Efficiently manage companies' HR inside The Awesome CRM module.

- Full employee profiles
- Contracts
- Insurances
- Work shifts
- Allowances
- Job positions
- Workplaces
- Salaries

Price: **R2499.00**

● CRM MODULES

*The CRM standalone is required.

ADDITIONAL CRM MODULES

Inventory Management Module

Allows you to track goods across your business's supply chain.

- Manage large product volumes
- Operate multiple locations
- Automatically generate product data
- Streamline your stocktake
- Stock loss and adjustments
- Supervisor approval inventory write-offs
- Stock transfers

Price: **R4999.00**

Purchase Management Module

Manage the activities and relationships that makeup purchasing functions necessary to do business.

- Managed extended item lists
- Vendor management
- Manage procurement requests of departments
- Manage quotes from vendors
- Manage purchase orders from vendors
- Manage purchase quotations and orders
- Convert purchase orders to expenses
- Manage contracts of vendors
- Invoice and payment management
- Reports and charts
- Vendor portal

Price: **R4999.00**

● CRM MODULES

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ADDITIONAL CRM MODULES

Asset Management Module

Manage your companies' assets.

- Create assets
- Create customer-based assets, corporate-only assets, and mixed ones
- Revoke an asset
- Add additional assets in existing asset
- Assign an asset on a specific staff user
- Transfer assets between users
- Report an asset loss
- Report an asset as broken
- Liquidation record of an asset
- Warranty record of an asset
- Allocated assets list
- Revoked assets list
- Deprecated assets list
- Ability to separate assets based on unique units, asset groups, and asset locations
- Ability to add images to your assets

Price: **R4999.00**

CRM App (Android)

Turn your CRM into a fully-fledged Android app.

Price: **R6999.00**

CRM MODULES

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ADDITIONAL CRM MODULES

Appointments and Callbacks Module

This module can schedule appointments to your CRM from external forms such as websites including Google/Outlook Calendar integration.

- Schedule appointments
- Manage callbacks
- Email and SMS templates
- Reminders
- Live notifications
- Email notifications

Price: **R2499.00**

CRM Chat Module

A powerful real-time chat add-on, using Pusher integration.

- Employees
- Clients
- Group chats

Price: **R2999.00**

Mailbox - Webmail Based Module

Allows your staff members to read and send emails through the CRM using IMAP.

- Alternative to using Outlook

Price: **R1799.00**

● CRM MODULES

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ADDITIONAL CRM MODULES

All-in-One Chat Support Module

Provide client support through WhatsApp, Viber, Telegram, Messenger, and Mail.

Price: **R1500.00**

Payment Gateway Modules

Payment gateways for your CRM.

- Skrill
- GoCardless
- Mercado Pago
- Bitpay
- myPOS
- Razorpay

Price: **R1500.00** per gateway

E-Commerce Module

POS and inventory management.

Price: **R4999.00**

QuickBooks Module

Sync your CRM payments with your QuickBooks account.

- Incoming invoice payments support
- Expenses (outgoing payments) support
- Autopilot

Price: **R2999.00**

● CRM MODULES

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ADDITIONAL CRM MODULES

Omni-Channel Sales Module

The process of selling your products on more than one sales channel.

Omni Channel Sales Module is the process of selling your products on more than one sales channel. Multichannel management includes a mix of your own website, client portal, POS, and multi-stores Woocommerce.

- *Requires Inventory Module

Price: **R2100.00**

HR Payroll Management Module

HR Payroll module allows you to pay your employees quickly and correctly every time you run payroll. The right system can shave hours off your payroll process, help you pay payroll taxes, and comply with labor laws.

- Employee master data
- Attendances
- Commissions
- Deductions
- Earnings
- Insurances
- Bonus KPI
- Personal income tax
- Payroll templates
- Payslips
- Payroll reports

Price: **R2499.00**

● CRM MODULES

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ADDITIONAL CRM MODULES

HR Record Management Module

HR Records is a human resource records system. The primary function is to provide a central database containing records for all employees past and present. Human resource records refer to the informational documents utilized by an organization to carry out its functions. It represents the memory of the organization.

- Organizational chart
- Job descriptions
- Training
- On-boarding process
- Personnel records
- Dependants
- Lay-off checklist
- HR policies
- HR contracts
- HR reports
- Q&A

Price: **R2499.00**



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