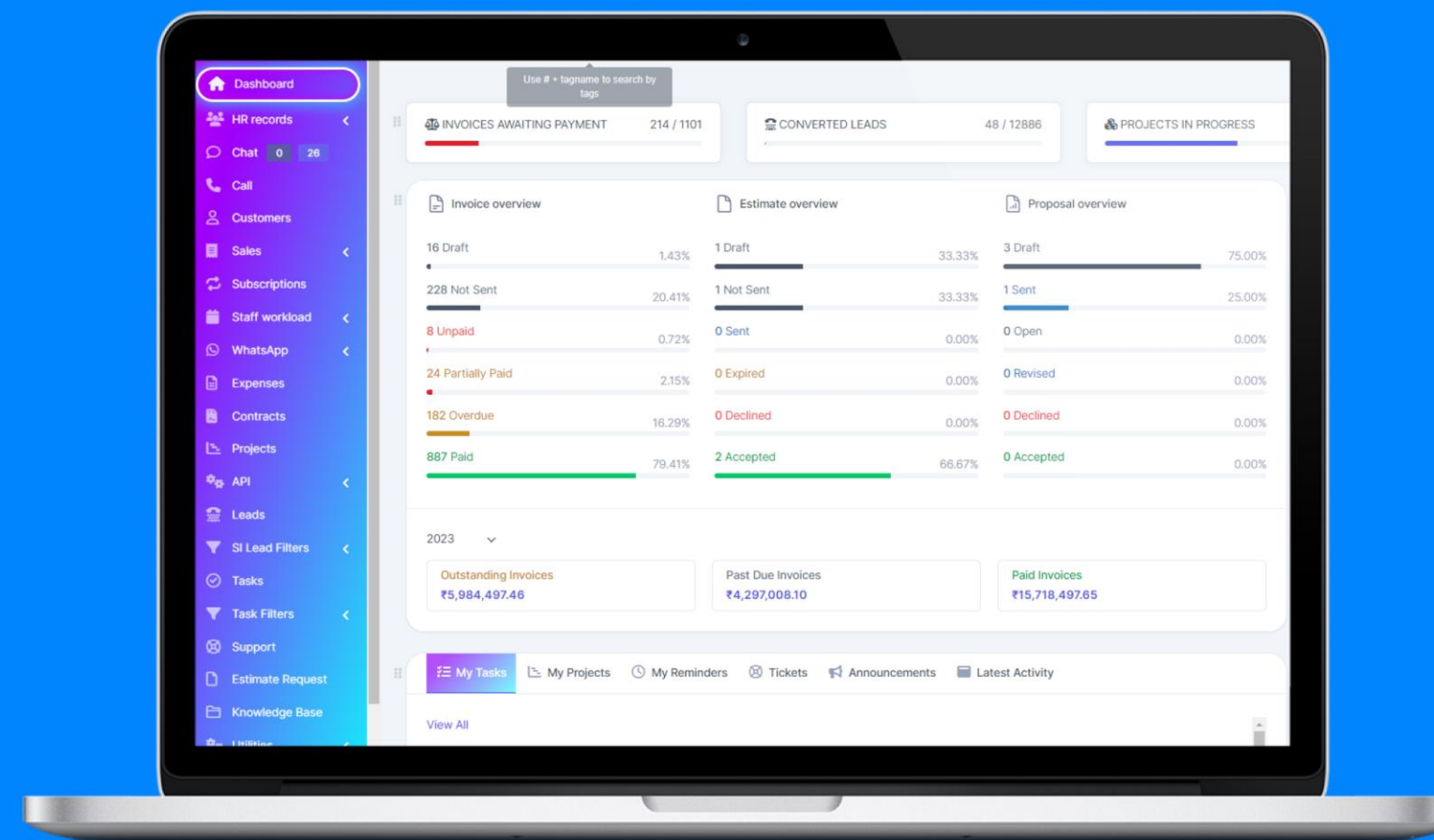




NETTYFISH SOLUTIONS' CRM



SCROLL FOR MORE

NETTYFISH SOLUTIONS' CRM

CRM is a powerful software solution for businesses to manage and nurture customer relationships. It is designed to streamline various aspects of customer interactions, sales, and marketing processes.

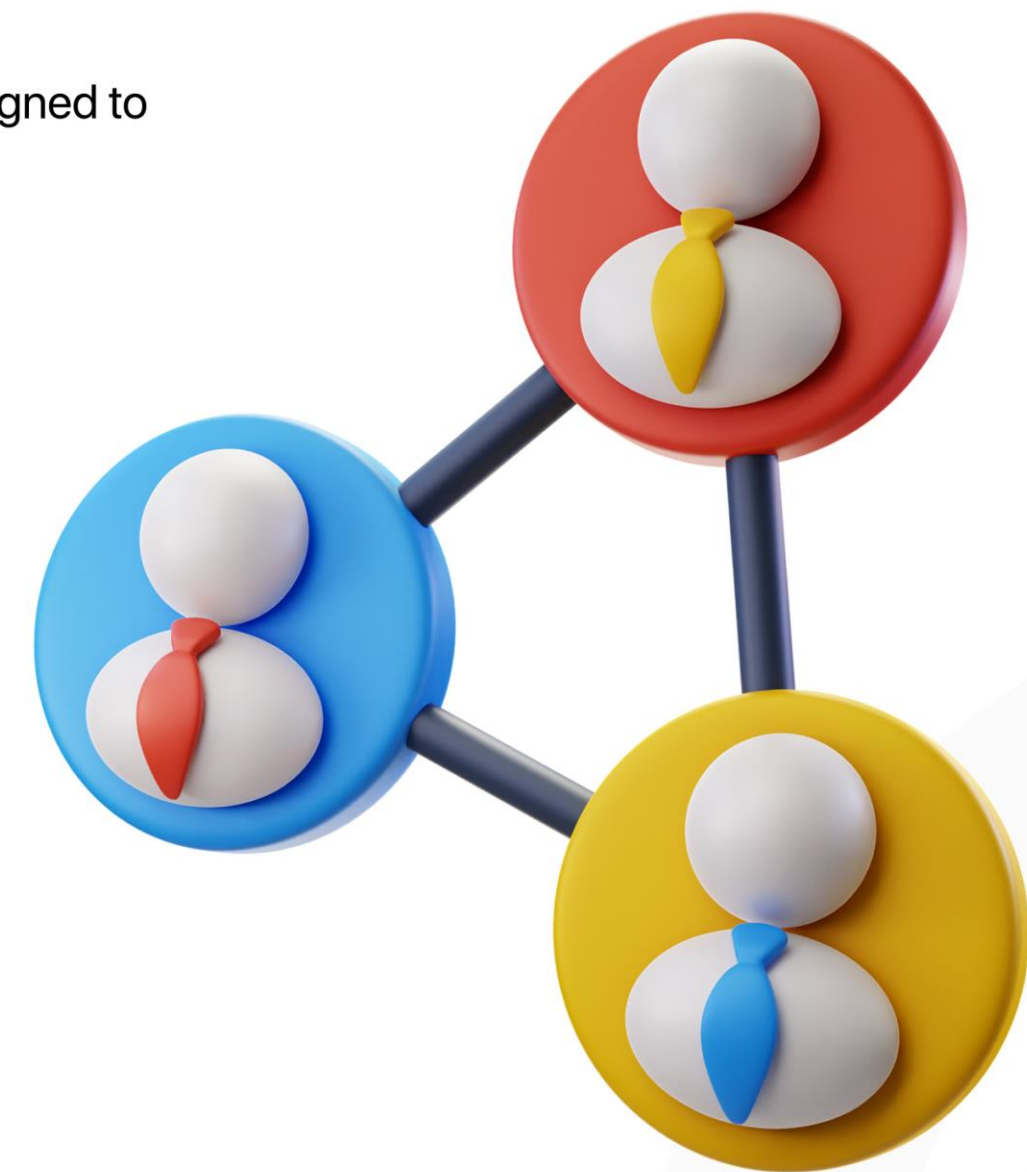
CRM can be used across various domains like,

Sales

Marketing

Customer Service

Support



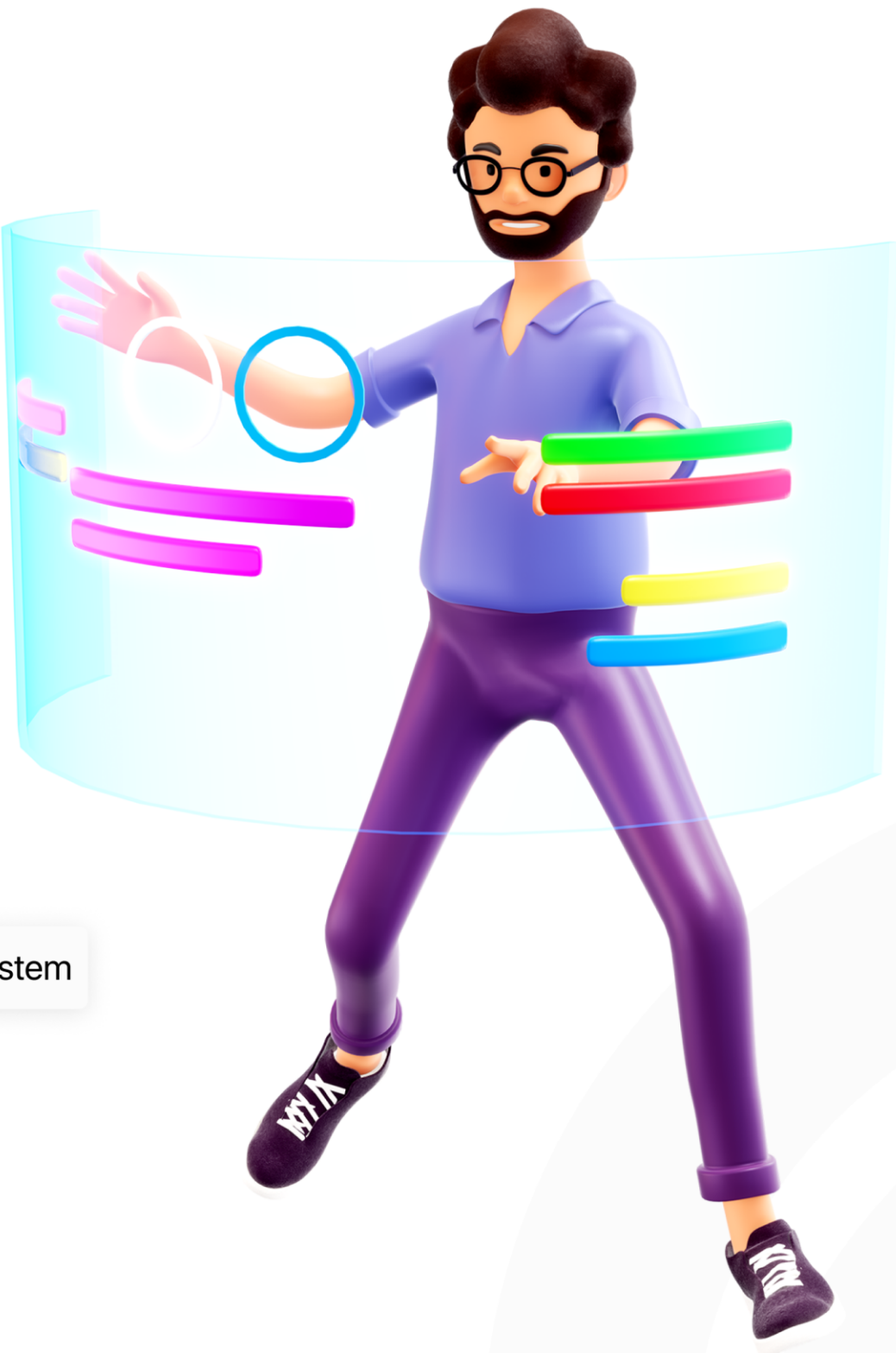
WHAT OUR CRM HAS TO OFFER?

Integrations: CRM systems offer a wide range of integrations with popular business tools and platforms to enhance functionality and streamline workflows. Common integrations include email marketing platforms, customer support systems, social media platforms, and productivity tools.

APIs: CRM systems often provide APIs (Application Programming Interfaces) that allow businesses to integrate custom applications and develop tailored solutions. APIs enable seamless data exchange between the CRM system and other applications, enabling automation and improving efficiency.

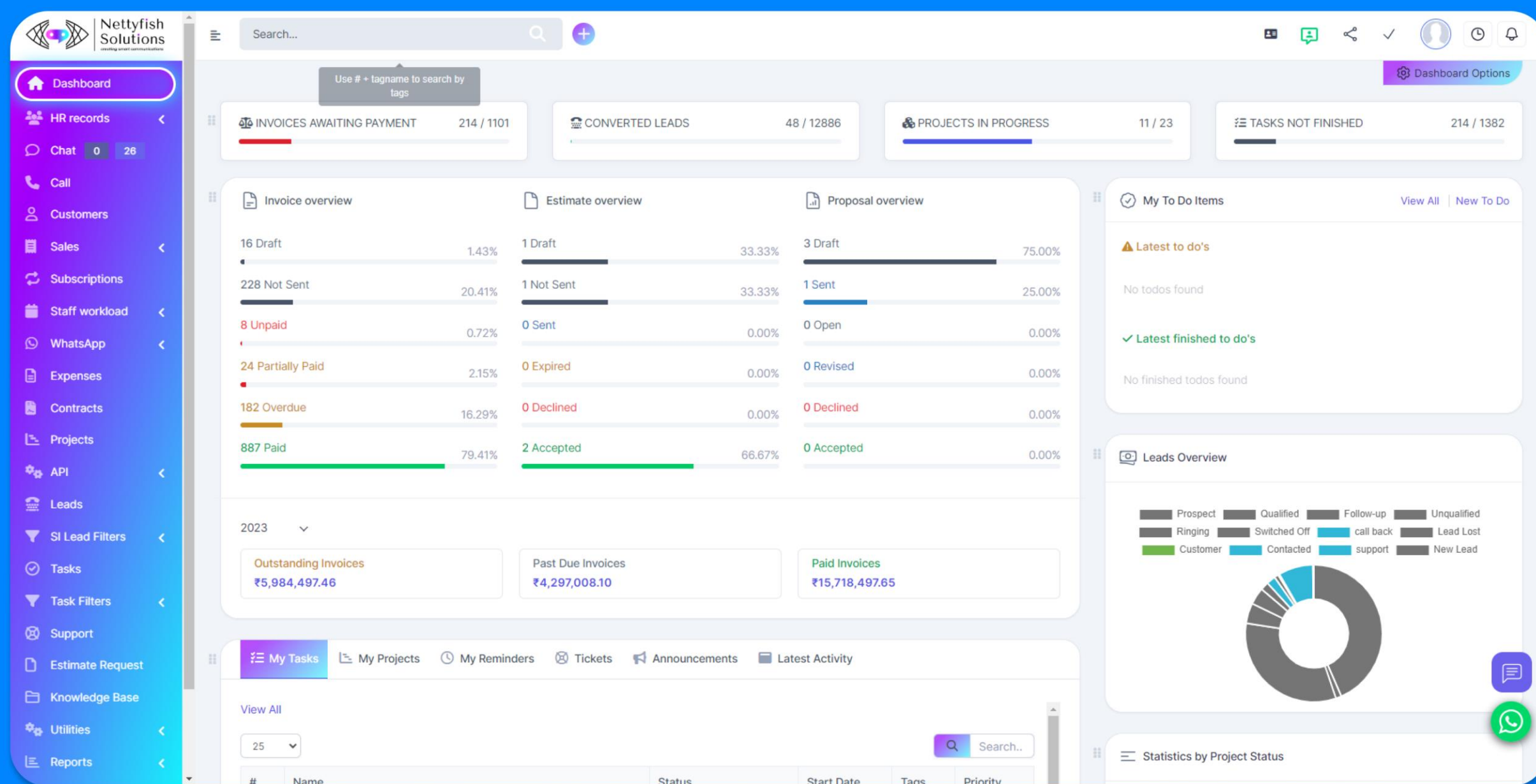
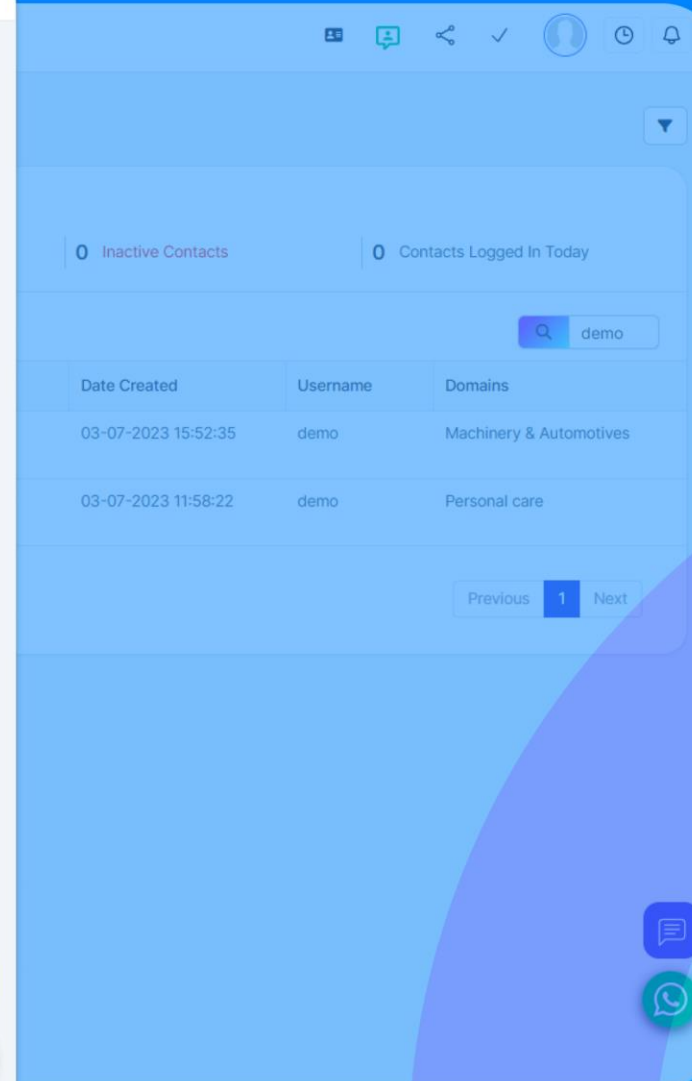
Modules: CRM systems typically offer modules that cater to specific functions and processes within a business. Common modules include:

Sales Management	Helps track leads, manage opportunities, and automate sales processes
Marketing Automation	Facilitates lead generation, email campaigns, and tracking of marketing activities
Customer Support	Enables ticket management, customer inquiries, and support ticket tracking
Contact Management	Centralizes customer data, including contact details, interactions, and preferences
Reporting and Analytics	Provides insights into sales performance, customer behavior, and campaign effectiveness
Workflow Automation	Automates repetitive tasks, workflows, and notifications for improved efficiency
Collaboration and Communication	Facilitates team collaboration, document sharing, and communication within the CRM system
Customer Service	Manages customer requests, inquiries, and support cases
E-commerce Integration	Integrates with e-commerce platforms to manage customer orders, inventory, and sales data
Mobile Access	Allows access to CRM features and data through mobile devices for on-the-go productivity



DASHBOARD

Unlock the Power of Customization with Our CRM Dashboard! Tailor the interface, data visualizations, and key metrics to your unique business needs. Get a real-time snapshot of your sales, customer interactions, and performance, all in a visually stunning and user-friendly dashboard. Empower your team with actionable insights for informed decision-making.

Inactive Contacts

0 Inactive Contacts | 0 Contacts Logged In Today

Search: demo

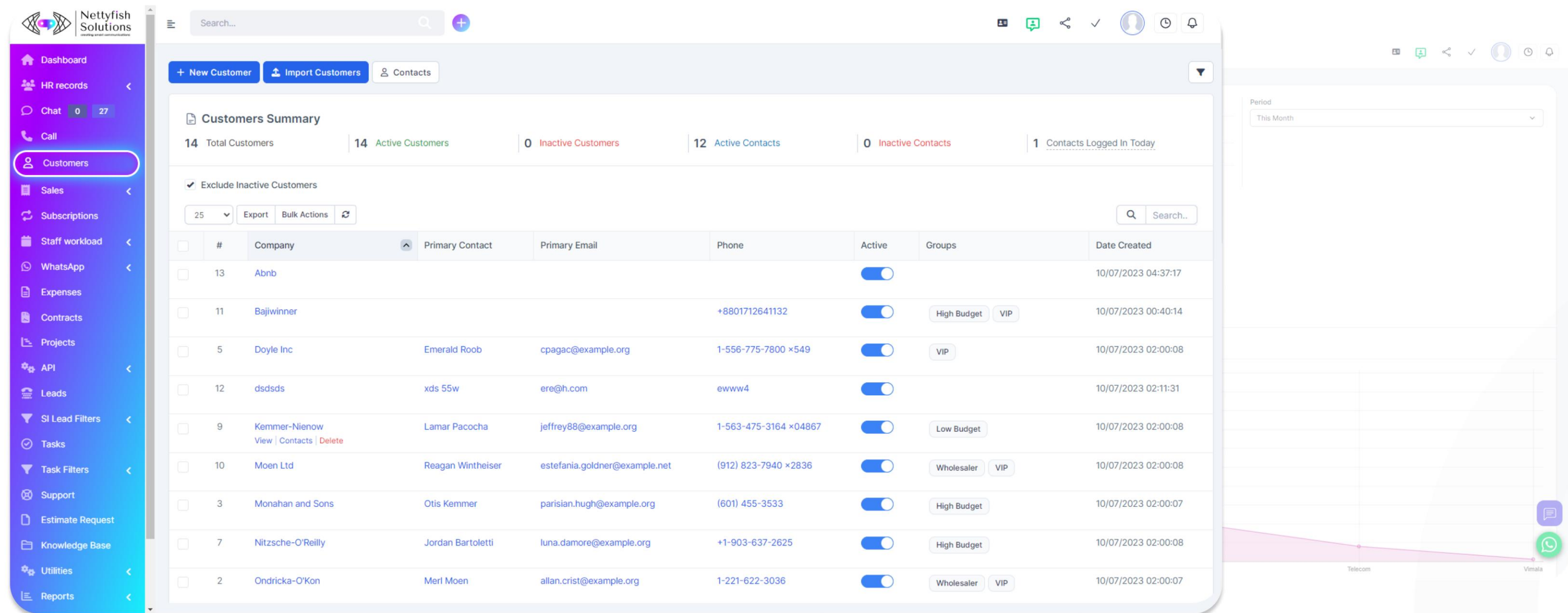
Date Created	Username	Domains
03-07-2023 15:52:35	demo	Machinery & Automotives
03-07-2023 11:58:22	demo	Personal care

Previous 1 Next

CUSTOMERS

Deliver Exceptional Customer Experiences with Our Powerful Customers Module! Seamlessly manage customer profiles, interactions, and preferences in one centralized hub.

Gain a comprehensive view of your customers, track communication history, and personalize engagements. Nurture relationships, drive loyalty, and unlock new business opportunities with ease.



The screenshot displays the Nettyfish Solutions Customers Module interface. On the left is a sidebar with navigation options: Dashboard, HR records, Chat (0/27), Call, Customers (selected), Sales, Subscriptions, Staff workload, WhatsApp, Expenses, Contracts, Projects, API, Leads, SI Lead Filters, Tasks, Task Filters, Support, Estimate Request, Knowledge Base, Utilities, and Reports.

The main content area features a search bar and buttons for '+ New Customer', 'Import Customers', and 'Contacts'. Below this is a 'Customers Summary' section showing: 14 Total Customers, 14 Active Customers, 0 Inactive Customers, 12 Active Contacts, 0 Inactive Contacts, and 1 Contact Logged In Today. A checkbox for 'Exclude Inactive Customers' is checked.

A table lists customer records with columns: #, Company, Primary Contact, Primary Email, Phone, Active, Groups, and Date Created. The table includes 10 rows of data, with the 9th row (Kemmer-Nienow) having a 'View | Contacts | Delete' link.

On the right, a 'Period' dropdown is set to 'This Month', and a line chart is partially visible with data points for 'Telecom' and 'Vimala'.

#	Company	Primary Contact	Primary Email	Phone	Active	Groups	Date Created
13	Abnb				On		10/07/2023 04:37:17
11	Bajjwinner			+8801712641132	On	High Budget, VIP	10/07/2023 00:40:14
5	Doyle Inc	Emerald Roob	cpagac@example.org	1-556-775-7800 x549	On	VIP	10/07/2023 02:00:08
12	dsdsds	xds 55w	ere@h.com	ewww4	On		10/07/2023 02:11:31
9	Kemmer-Nienow	Lamar Pacocha	jeffrey88@example.org	1-563-475-3164 x04867	On	Low Budget	10/07/2023 02:00:08
10	Moen Ltd	Reagan Wintheiser	estefania.goldner@example.net	(912) 823-7940 x2836	On	Wholesaler, VIP	10/07/2023 02:00:08
3	Monahan and Sons	Otis Kemmer	parisian.hugh@example.org	(601) 455-3533	On	High Budget	10/07/2023 02:00:07
7	Nitzsche-O'Reilly	Jordan Bartoletti	luna.damore@example.org	+1-903-637-2625	On	High Budget	10/07/2023 02:00:08
2	Ondricka-O'Kon	Merl Moen	allan.crist@example.org	1-221-622-3036	On	Wholesaler, VIP	10/07/2023 02:00:07

SALES



Boost Your Sales Success with Our Dynamic Sales Module! Streamline your sales processes, track leads, and close deals faster than ever. From lead generation to opportunity management, our module provides a comprehensive suite of tools to drive revenue growth. Maximize sales productivity and achieve exceptional results with ease.

Proposals: Elevate Your Sales Team’s efficiency with our Cutting-edge Module!. Effortlessly create and track proposal progress to gain complete insights and status updates in a single click.

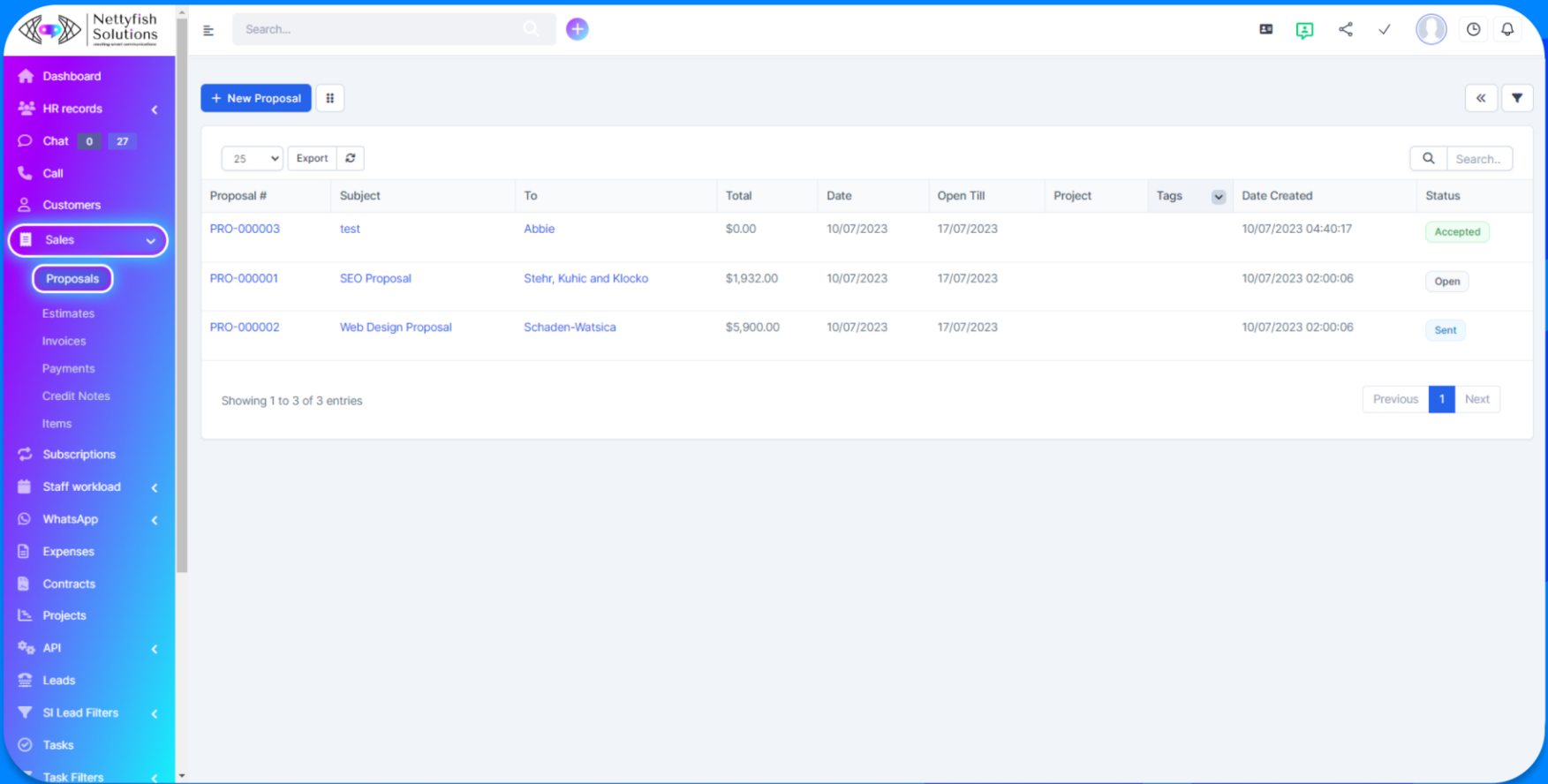
Estimates: Streamline your estimation process by creating detailed estimates, link estimate to project, send estimate to Email, converting estimate to Invoice, converting proposal to estimate/invoice, and exporting customers’ Invoices/Estimates/Payment to ZIP. Drive profitability and deliver exceptional value with our Estimation Module.

Invoices: Simplify Your Invoicing Process by generating professional invoices, effortlessly track payments, and streamline financial operations. Customize invoice templates, automate recurring billing, and ensure timely payment reminders. Stay organized, improve cash flow, and delight customers with our user-friendly Invoice Module.

Payments: Effortless manage your payment processes with our secure and reliable module. Track transactions, and automate client/vendor payment reminders to gain control and optimize your financial operations

Credit Notes: Easily handle returns, refunds, and adjustments with credit note feature. Maintain accurate records, track credit usage, and ensure smooth financial transactions.

Items: Organize and track your inventory, services, and offerings in one centralized hub. Enjoy customizable item fields, variants, and pricing options.



FINANCE

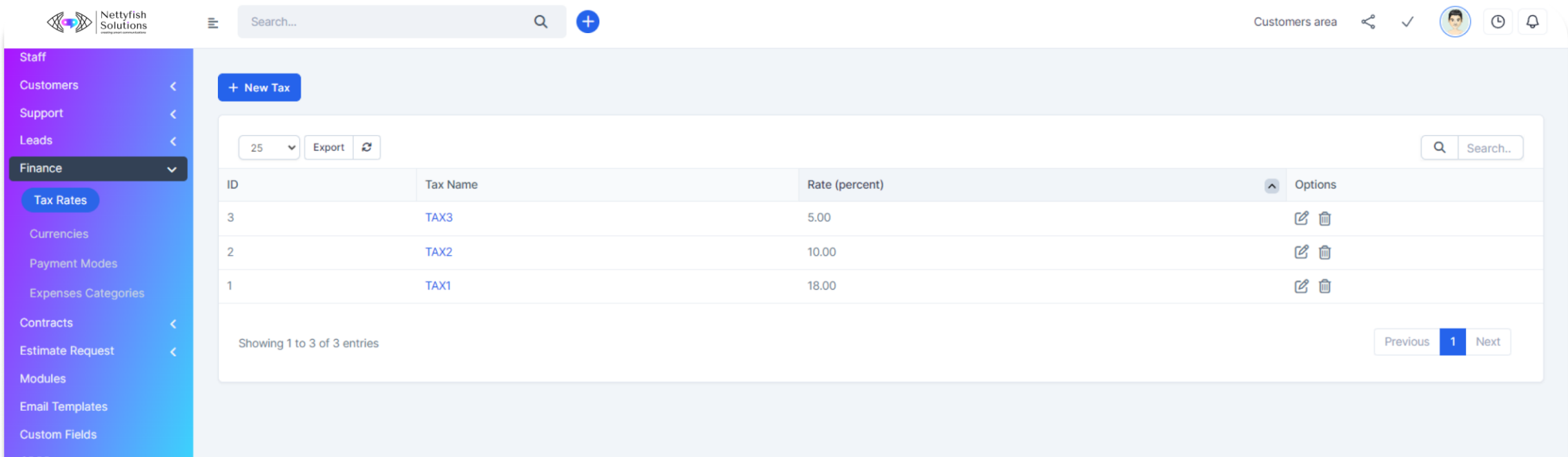
Gain real-time visibility into your financial performance, track expenses, and manage budgets with ease. Simplify financial reporting, streamline invoicing, and optimize cash flow. Make informed financial decisions and drive profitability with our comprehensive Finance Module.

Tax Rates: Stay compliant and simplify tax calculations with ease. Customize tax rates for different regions, products, and services. Automate tax calculations, streamline invoicing, and ensure accurate financial reporting.

Currencies: Seamlessly manage multiple currencies, exchange rates, and currency conversions. Gain real-time insights into your international transactions, streamline financial operations, and ensure accurate reporting.

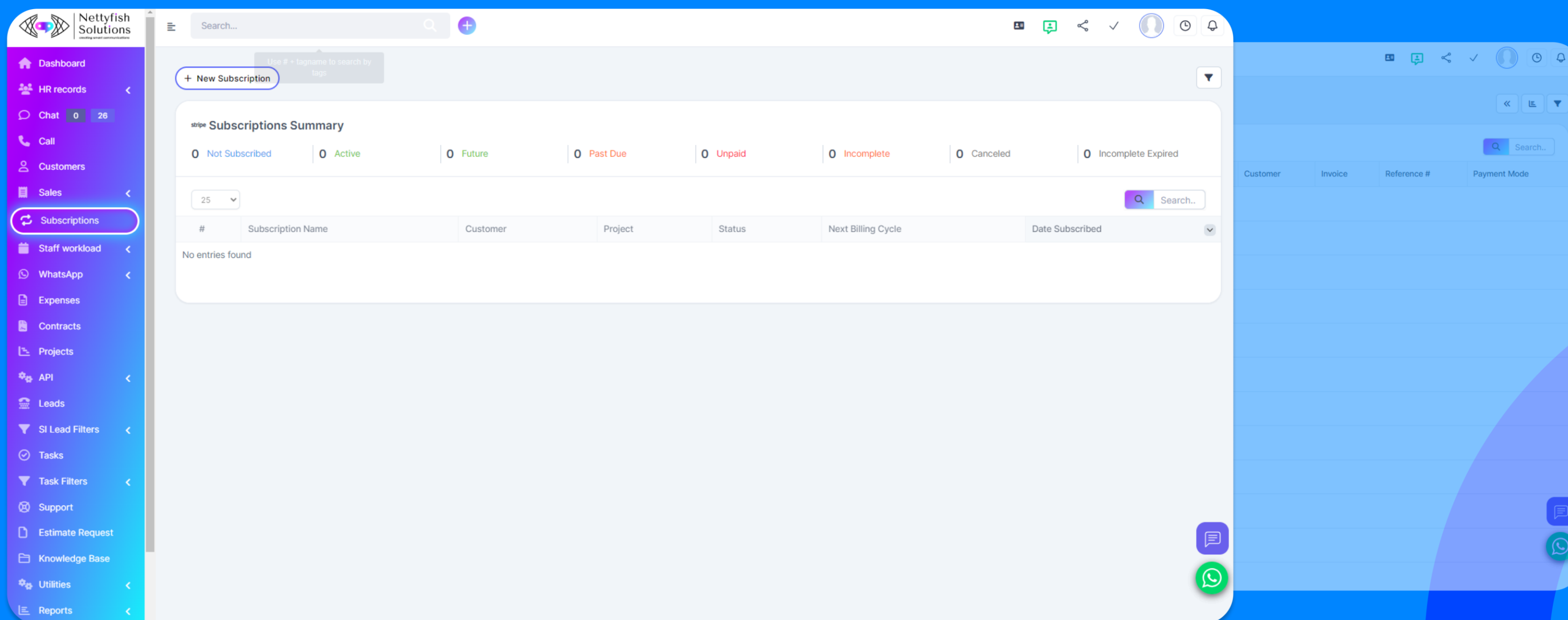
Payment Modes: Seamlessly accept and manage payments from various modes, including credit cards, bank transfers, UPIs and digital wallets. Enhance customer convenience, improve cash flow, and ensure secure transactions.

Expenses Categories: Organize expenses into customizable categories, streamline expense entry, and gain valuable insights into your spending. Simplify expense reporting, optimize budget allocation, and improve financial control.



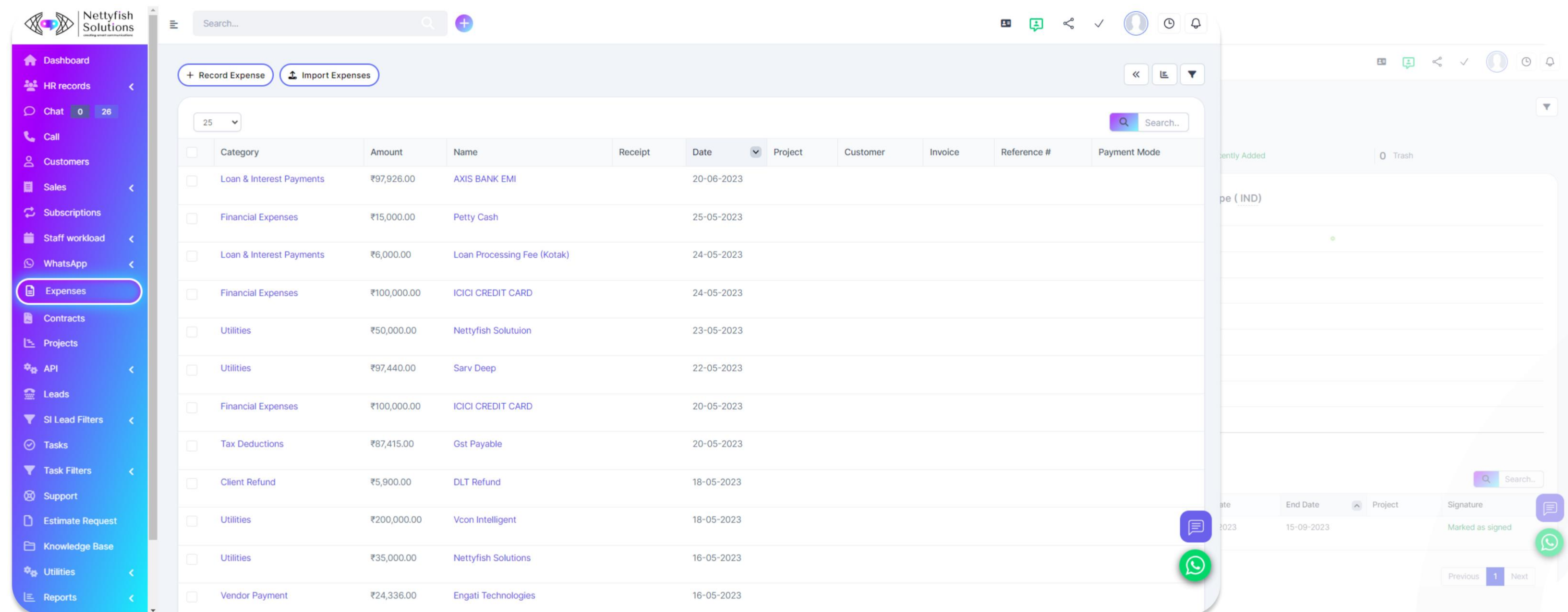
SUBSCRIPTIONS

Streamline Your Subscription Management with Our CRM's Subscriptions Module! Easily manage recurring subscriptions, automate billing cycles, and ensure timely renewals. Customize subscription plans, track customer preferences, and deliver personalized experiences. Increase customer retention, drive revenue growth, and simplify subscription management with our powerful Subscriptions Module.



EXPENSES

Effortlessly Track and Manage Expenses with Our CRM's Expenses Module! Capture and categorize expenses, track receipts, and streamline expense approvals. Gain real-time visibility into your spending, optimize budget allocation, and simplify expense reporting. Take control of your expenses and drive financial efficiency with our user-friendly Expenses Module.



The screenshot displays the Nettyfish Solutions CRM interface, specifically the Expenses Module. The sidebar on the left contains various navigation options, with 'Expenses' highlighted. The main area shows a table of expense records with columns for Category, Amount, Name, Receipt, Date, Project, Customer, Invoice, Reference #, and Payment Mode. A detailed view of a specific expense record is shown on the right, including fields for Date, End Date, Project, Signature, and a 'Marked as signed' status.

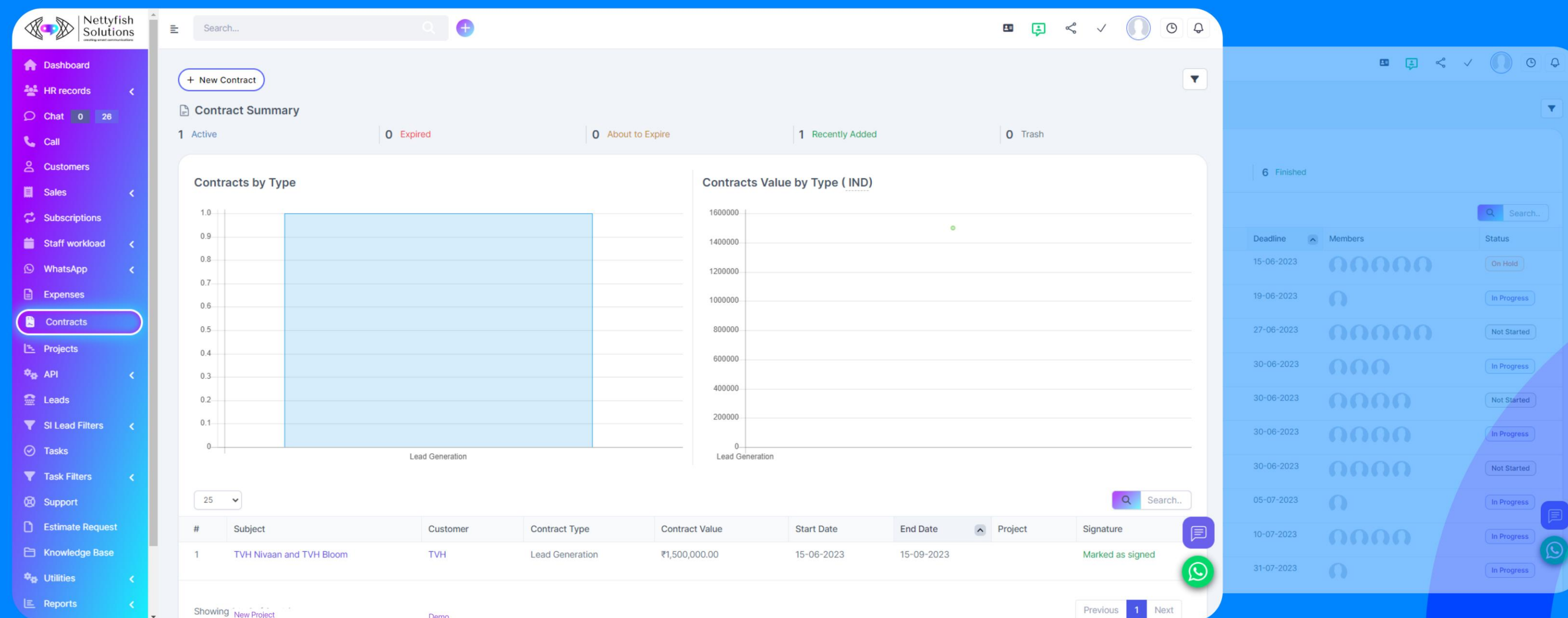
Category	Amount	Name	Receipt	Date	Project	Customer	Invoice	Reference #	Payment Mode
Loan & Interest Payments	₹97,926.00	AXIS BANK EMI		20-06-2023					
Financial Expenses	₹15,000.00	Petty Cash		25-05-2023					
Loan & Interest Payments	₹6,000.00	Loan Processing Fee (Kotak)		24-05-2023					
Financial Expenses	₹100,000.00	ICICI CREDIT CARD		24-05-2023					
Utilities	₹50,000.00	Nettyfish Solutuion		23-05-2023					
Utilities	₹97,440.00	Sarv Deep		22-05-2023					
Financial Expenses	₹100,000.00	ICICI CREDIT CARD		20-05-2023					
Tax Deductions	₹87,415.00	Gst Payable		20-05-2023					
Client Refund	₹5,900.00	DLT Refund		18-05-2023					
Utilities	₹200,000.00	Vcon Intelligent		18-05-2023					
Utilities	₹35,000.00	Nettyfish Solutions		16-05-2023					
Vendor Payment	₹24,336.00	Engati Technologies		16-05-2023					

CONTRACTS

Simplify Customer Contract Management with Our CRM's Customer Contracts Module! Seamlessly create, track, and manage customer contracts in one centralized hub.

Stay on top of contract details, renewal dates, and milestones. Streamline contract negotiations, enhance customer relationships, and drive business growth with our robust

Customer Contracts Module.



The screenshot displays the Nettyfish CRM's Customer Contracts Module. The interface features a sidebar with navigation options: Dashboard, HR records, Chat (0/26), Call, Customers, Sales, Subscriptions, Staff workload, WhatsApp, Expenses, **Contracts**, Projects, API, Leads, SI Lead Filters, Tasks, Task Filters, Support, Estimate Request, Knowledge Base, Utilities, and Reports.

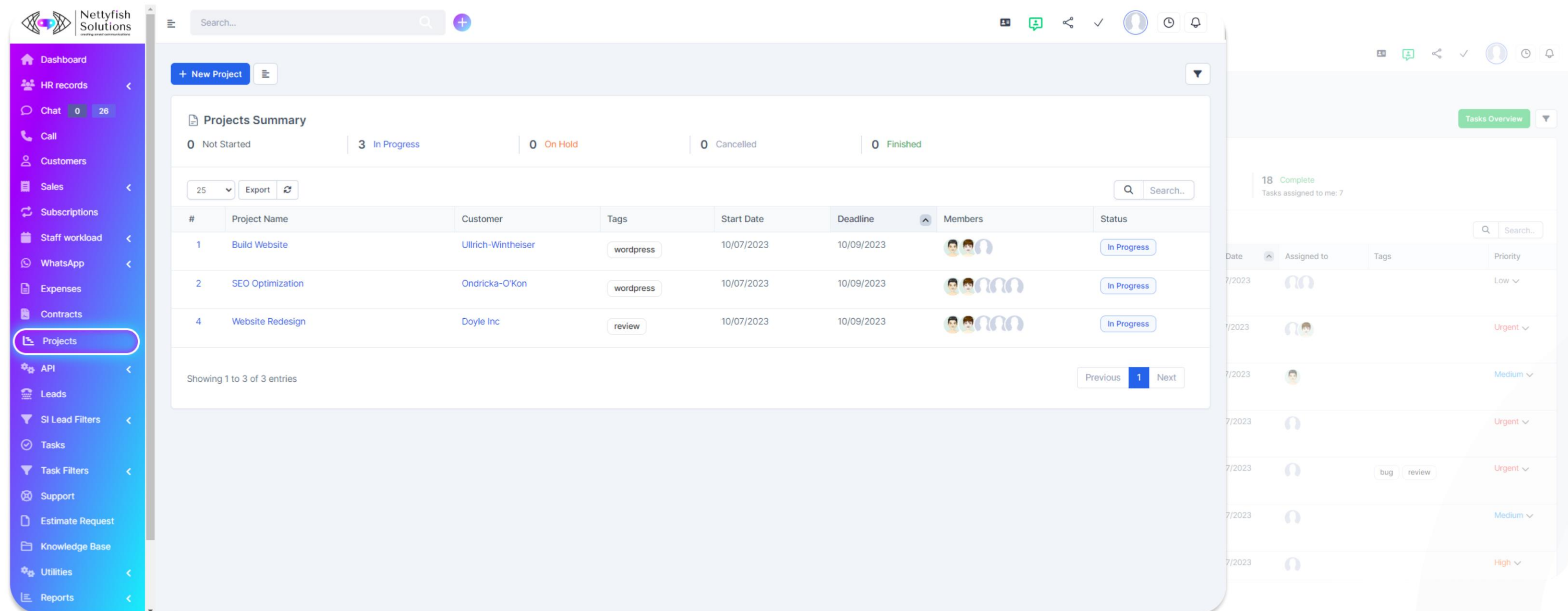
The main content area is titled "Contract Summary" and includes a "+ New Contract" button. It shows a summary of contract status: 1 Active, 0 Expired, 0 About to Expire, 1 Recently Added, and 0 Trash. Below this, there are two charts: "Contracts by Type" (a bar chart showing a single bar for "Lead Generation" at a value of 1.0) and "Contracts Value by Type (IND)" (a bar chart showing a single bar for "Lead Generation" at a value of ₹1,500,000.00).

A table below the charts displays contract details. The table has columns: #, Subject, Customer, Contract Type, Contract Value, Start Date, End Date, Project, and Signature. The first row shows a contract for "TVH Nivaan and TVH Bloom" with a value of ₹1,500,000.00, starting on 15-06-2023 and ending on 15-09-2023, marked as "Marked as signed".

On the right side, there is a "6 Finished" section with a search bar and a table listing contract milestones. The table has columns: Deadline, Members, and Status. The milestones include dates from 15-06-2023 to 31-07-2023, with statuses like "On Hold", "In Progress", and "Not Started".

PROJECTS

Efficient Project Management Made Easy with Our CRM's Projects Module! Plan, track, and collaborate on projects seamlessly in one centralized platform. Manage tasks, allocate resources, and monitor project progress with ease. Streamline workflows, enhance team collaboration, and deliver successful projects on time with our powerful Projects Module.



The screenshot displays the Nettyfish CRM interface, specifically the Projects Module. On the left is a vertical sidebar with navigation options: Dashboard, HR records, Chat (0/26), Call, Customers, Sales, Subscriptions, Staff workload, WhatsApp, Expenses, Contracts, **Projects** (highlighted), API, Leads, SI Lead Filters, Tasks, Task Filters, Support, Estimate Request, Knowledge Base, Utilities, and Reports.

The main content area features a 'Projects Summary' section with a '+ New Project' button and a search bar. Below this is a status overview: 0 Not Started, 3 In Progress, 0 On Hold, 0 Cancelled, and 0 Finished. A table lists the active projects:

#	Project Name	Customer	Tags	Start Date	Deadline	Members	Status
1	Build Website	Ullrich-Wintheiser	wordpress	10/07/2023	10/09/2023	2 members	In Progress
2	SEO Optimization	Ondricka-O'Kon	wordpress	10/07/2023	10/09/2023	4 members	In Progress
4	Website Redesign	Doyle Inc	review	10/07/2023	10/09/2023	4 members	In Progress

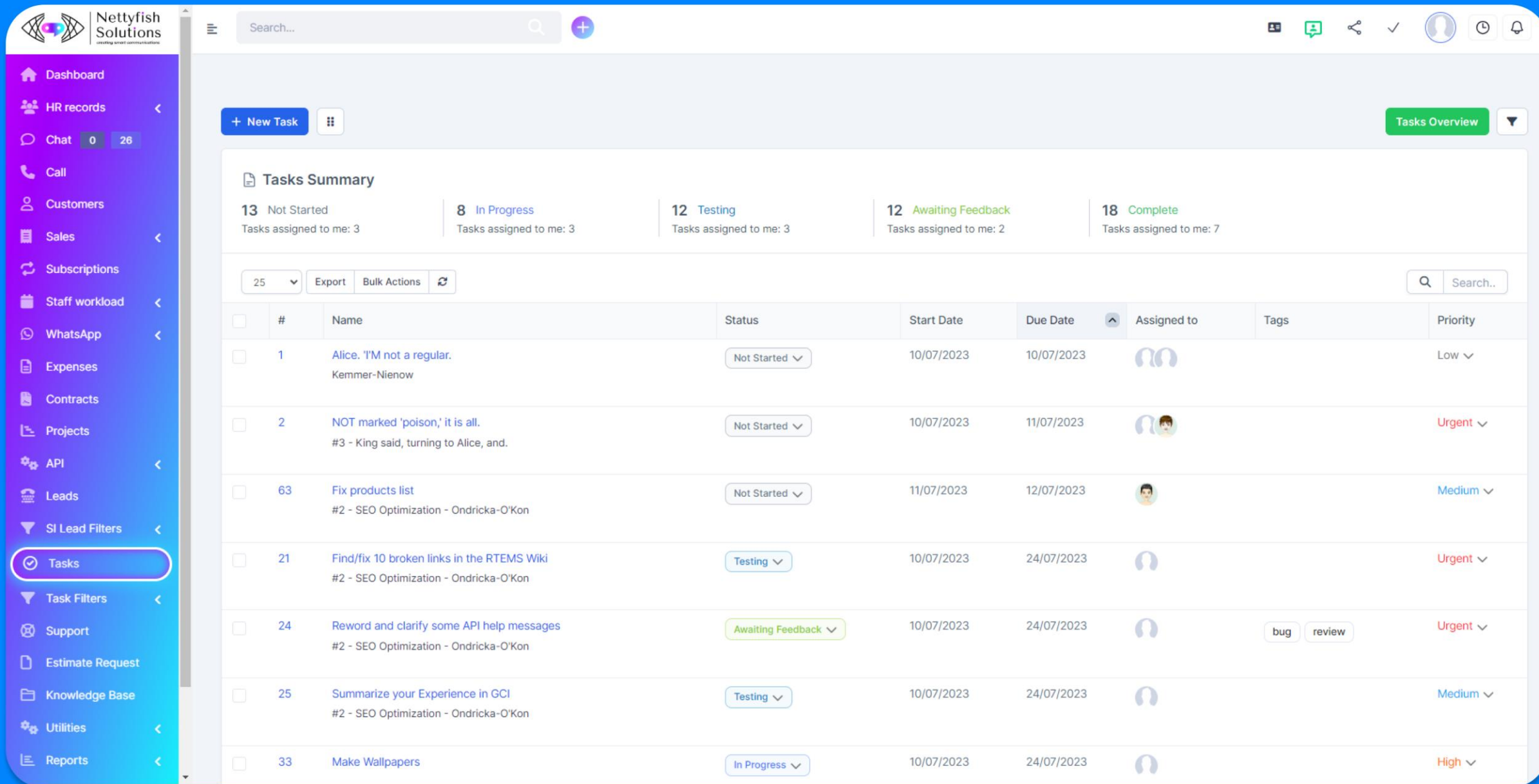
Below the table, it indicates 'Showing 1 to 3 of 3 entries' with 'Previous', '1', and 'Next' navigation links.

On the right, a 'Tasks Overview' panel shows '18 Complete' tasks, with 'Tasks assigned to me: 7'. It includes a search bar and a table with columns for Date, Assigned to, Tags, and Priority. The visible tasks are:

Date	Assigned to	Tags	Priority
7/2023	2 members		Low
7/2023	1 member		Urgent
7/2023	1 member		Medium
7/2023	1 member		Urgent
7/2023	1 member	bug, review	Urgent
7/2023	1 member		Medium
7/2023	1 member		High

TASKS

Elevate Employee Productivity with Our CRM's Tasks Management Module! Streamline task assignment, tracking, and collaboration in one centralized hub. Easily prioritize, delegate, and monitor tasks to ensure efficient workflow. Empower your team, boost efficiency, and achieve project success with our robust Employee Tasks Management Module.



The screenshot displays the Nettyfish Solutions CRM interface, specifically the Tasks Management Module. The left sidebar contains a navigation menu with options: Dashboard, HR records, Chat (0/26), Call, Customers, Sales, Subscriptions, Staff workload, WhatsApp, Expenses, Contracts, Projects, API, Leads, SI Lead Filters, **Tasks** (selected), Task Filters, Support, Estimate Request, Knowledge Base, Utilities, and Reports.

The main content area features a search bar at the top. Below it, a "Tasks Summary" section provides a high-level overview of task status distribution:

- 13 Not Started** (Tasks assigned to me: 3)
- 8 In Progress** (Tasks assigned to me: 3)
- 12 Testing** (Tasks assigned to me: 3)
- 12 Awaiting Feedback** (Tasks assigned to me: 2)
- 18 Complete** (Tasks assigned to me: 7)

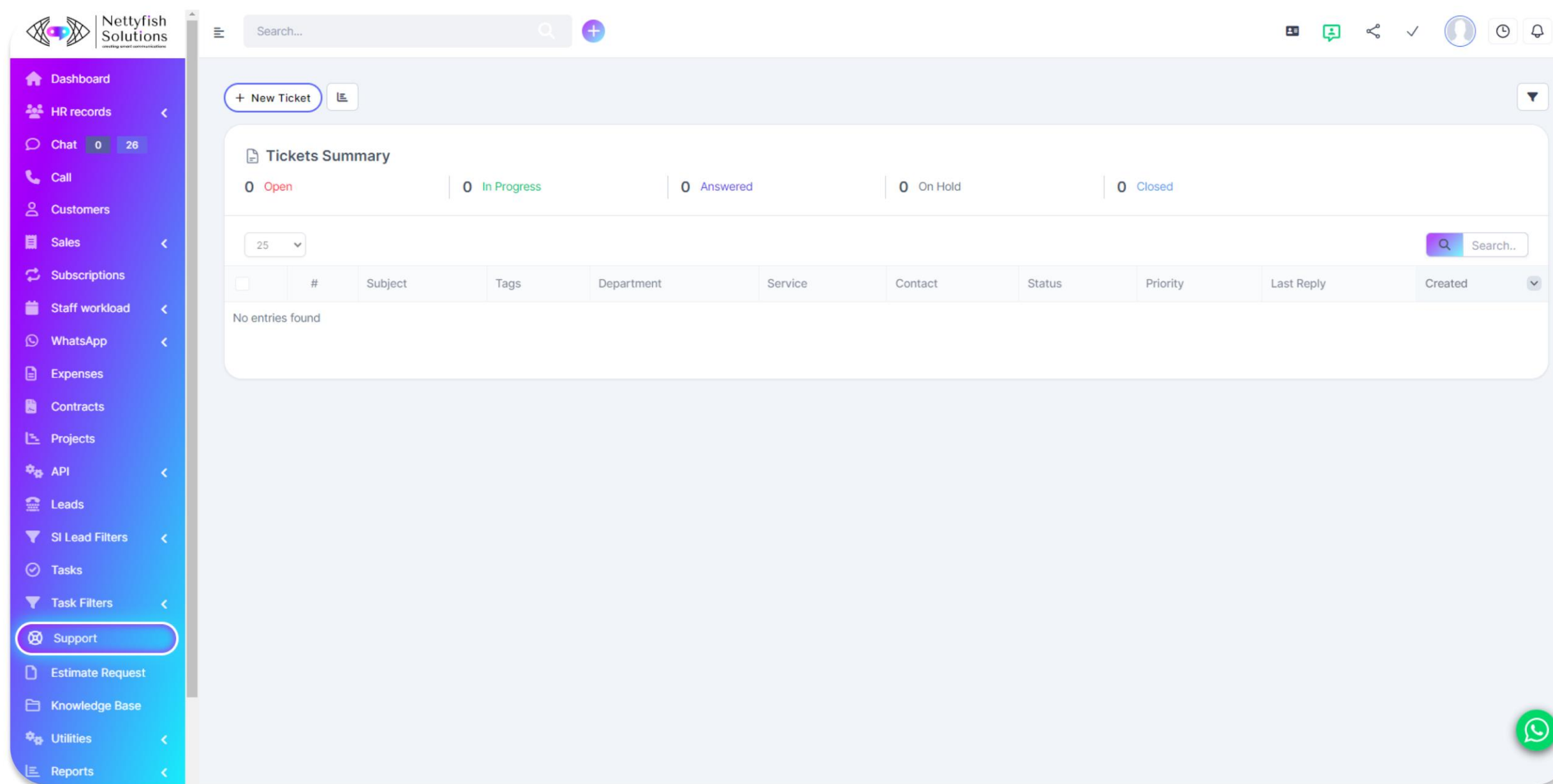
Below the summary, there are controls for "25" items, "Export", "Bulk Actions", and a search bar. The main table lists individual tasks with the following columns: #, Name, Status, Start Date, Due Date, Assigned to, Tags, and Priority.

#	Name	Status	Start Date	Due Date	Assigned to	Tags	Priority
1	Alice. 'I'M not a regular. Kemmer-Nienow	Not Started	10/07/2023	10/07/2023	[Avatar]		Low
2	NOT marked 'poison,' it is all. #3 - King said, turning to Alice, and.	Not Started	10/07/2023	11/07/2023	[Avatar]		Urgent
63	Fix products list #2 - SEO Optimization - Ondricka-O'Kon	Not Started	11/07/2023	12/07/2023	[Avatar]		Medium
21	Find/fix 10 broken links in the RTEMS Wiki #2 - SEO Optimization - Ondricka-O'Kon	Testing	10/07/2023	24/07/2023	[Avatar]		Urgent
24	Reword and clarify some API help messages #2 - SEO Optimization - Ondricka-O'Kon	Awaiting Feedback	10/07/2023	24/07/2023	[Avatar]	bug review	Urgent
25	Summarize your Experience in GCI #2 - SEO Optimization - Ondricka-O'Kon	Testing	10/07/2023	24/07/2023	[Avatar]		Medium
33	Make Wallpapers	In Progress	10/07/2023	24/07/2023	[Avatar]		High

On the right side of the interface, a "Tasks Overview" button and a "Tasks Overview" dropdown are visible. Below the main table, there is a section for "0 Closed" tasks, a search bar, and filters for "Priority", "Last Reply", and "Created".

SUPPORT

Deliver Exceptional Customer Support with Our CRM's Support Tickets Module! Seamlessly manage and prioritize customer inquiries, track ticket status, and provide timely resolutions. Streamline communication, empower your support team, and enhance customer satisfaction. Provide outstanding support experiences with our comprehensive Support Tickets Module.



SALES - PAYMENTS

Effortless manage your payment processes with our secure and reliable module. Track transactions, and automate client/vendor payment reminders to gain control and optimize your financial operations.

Departments: Organize and manage support tickets based on departments, ensuring efficient ticket routing and timely resolutions.

Predefined Replies: Save time and ensure consistent responses with a library of predefined replies for common support inquiries. Accelerate ticket resolution, improve response quality, and enhance customer satisfaction.

Ticket Priority: Efficiently manage and assign ticket priorities based on urgency and impact. Streamline support operations, meet service level agreements, and deliver exceptional customer experiences.

Ticket Statuses: Stay organized with customizable ticket statuses, from open to resolved. Streamline ticket workflows and improve response times.

Services: Categorize and manage support tickets based on services offered. Streamline ticket routing, ensure proper resource allocation, and optimize service delivery.

Spam Filters: Prevent spam and irrelevant inquiries from cluttering your support system. Customize spam filters to ensure that genuine customer tickets are prioritized.

25

▼

Export

↺

🔍

Search..

Payment #	Invoice #	Payment Mode	Transaction ID	Customer	Amount	Date
8	INV-000009	Bank		Nitzsche-O'Reilly	\$70.80	10/07/2023
7	INV-000014	Bank		Moen Ltd	\$2,954.00	16/07/2023
6	INV-000002	Bank		Ondricka-O'Kon	\$5,602.00	10/07/2023
5	INV-000001	Bank		Ullrich-Wintheiser	\$459.00	14/07/2023
4	INV-000012	Bank		Rolfson, Larson and Considine	\$8,361.00	08/07/2023
3	INV-000005	Bank		Swift Inc	\$724.00	12/07/2023
2	INV-000011	Bank		Rolfson, Larson and Considine	\$856.20	08/07/2023
1	INV-000013	Bank		Kemmer-Nienow	\$2,848.00	10/07/2023

Showing 1 to 8 of 8 entries

Previous1Next

LEADS


Unleash the Power of Lead Management with Our CRM's Leads Management Module! Capture, track, and nurture leads with ease. Streamline lead assignment, qualification, and follow-up processes. Gain valuable insights, optimize conversions, and drive revenue growth. Simplify lead management and transform your sales pipeline with our robust Leads Management Module.

Sources: Easily identify and evaluate the sources of your leads to optimize marketing efforts. Gain insights into the most effective channels and campaigns.

Statuses: Stay organized with customizable lead statuses, from initial contact to conversion. Streamline lead workflows, improve lead qualification, and enhance sales efficiency.

Email Integration: Capture and track email conversations directly within your CRM. Streamline lead communication, enhance collaboration, and ensure timely follow-ups.

Web to Lead: Easily create customizable lead capture forms and embed them on your website. Streamline lead generation, capture key prospect information, and nurture leads effectively.

Nettyfish
Solutions
creating smart communications

Dashboard

HR records

Chat 026

Call

Customers

Sales

Subscriptions

Staff workload

WhatsApp

Expenses

Contracts

Projects

API

Leads

SI Lead Filters

Tasks

Task Filters

Support

Estimate Request

Knowledge Base

Utilities

Reports

Search...

Use # + tagname to search by

New Lead

Import Leads

Filter by

Assigned

New, Contacted, Qualified, Working, Proposal Sent

Source

Additional Filters

25

Export

Bulk Actions

Search..

	#	Name	Company	Email	Phone	Value	Tags	Assigned	Status	Source	Last Contact	Created
<input type="checkbox"/>	4	Dan Wiza View Edit Delete	Hintz-Lebsack	ezequiel69@example.org	+1.747.887.6413				New	Facebook		6 hrs ago
<input type="checkbox"/>	6	Cittalli Simonis	Koch-Ullrich	frami.nannie@example.net	(325) 979-4163 x50827		follow up		New	Facebook		6 hrs ago
<input type="checkbox"/>	8	Deron Cruickshank	Crooks, Hermiston and Hane	ortiz.alvina@example.com	905.941.5642 x62483		follow up tomorrow		New	Facebook		6 hrs ago
<input type="checkbox"/>	10	Prof. Aileen Leannon	Pollich-Walsh	dstrosin@example.org	(990) 961-5258 x02536		follow up tomorrow		New	Facebook		6 hrs ago
<input type="checkbox"/>	12	Marcelino Zieme PhD	Rosenbaum-Feil	jamie64@example.org	(657) 280-2270 x920				Contacted	Facebook		6 hrs ago
<input type="checkbox"/>	14	Mr. Trey Kautzer	Zboncak, Murray and Gleason	ccremin@example.com	+1.226.505.4845				Contacted	Facebook		6 hrs ago
<input type="checkbox"/>	16	Stanton Bergnaum V	Medhurst, Barton and Olson	douglas.kristin@example.net	1-752-765-2481		follow up		Contacted	Facebook		6 hrs ago
<input type="checkbox"/>	18	Alberto Miller	West-Erdman	monte.simonis@example.com	(537) 607-7883		follow up tomorrow		Contacted	Facebook		6 hrs ago


ESTIMATE REQUEST



Simplify and Streamline Estimate Requests with Our CRM's Estimate Request Module! Seamlessly manage and track incoming estimate requests from potential customers. Respond promptly, generate accurate estimates, and convert leads into sales. Enhance customer experience, boost efficiency, and drive business growth with our comprehensive Estimate Request Module.

Forms: Create custom forms to gather essential details from potential customers. Streamline the process of capturing and organizing estimate requests, ensuring timely follow-ups and accurate responses.

Statuses: Customize and monitor the status of each estimate request, from submission to completion. Streamline communication, improve response times, and enhance customer satisfaction.



Nettyfish
Solutions

creating smart communications

Dashboard

HR records

Chat027

Call

Customers

Sales

Proposals

Estimates

Invoices

Payments

Credit Notes

Items

Subscriptions

Search...

+ Create New Estimate

25

Search..

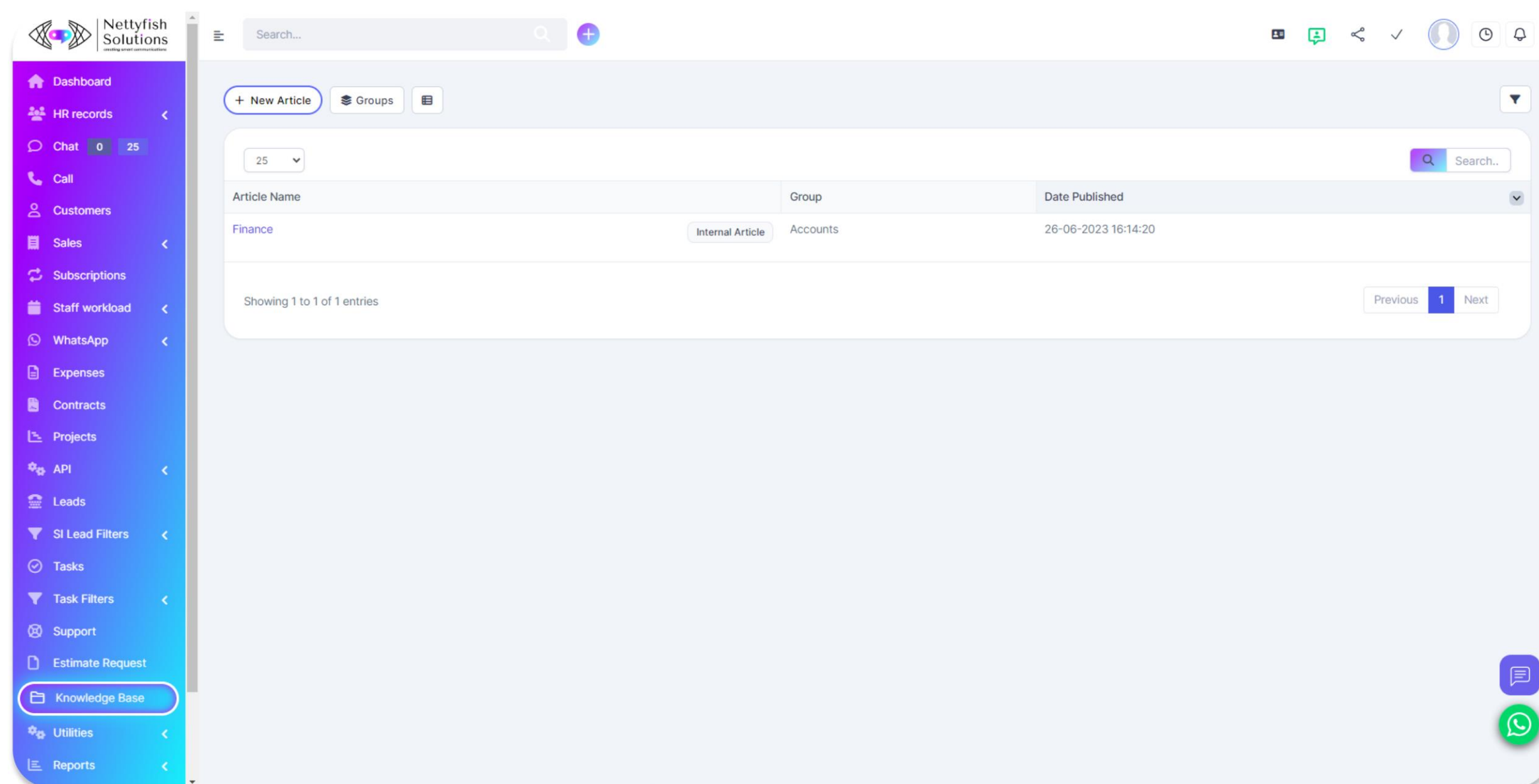
Estimate #	Amount	Total Tax	Customer	Project	Tags	Date	Expiry Date	Reference #	Status
EST-000005	₹3,000.00	₹0.00	demo			27-06-2023	04-07-2023		Draft
EST-000004	₹16,520.00 Invoiced	₹2,520.00	testing			13-06-2023	20-06-2023		Accepted
EST-000003	₹1,888.00 Invoiced	₹288.00	demoooo			13-06-2023	20-06-2023		Accepted

Showing 1 to 3 of 3 entries

Previous1Next

KNOWLEDGE BASE

Empower Your Team and Customers with Our CRM's Knowledge Base Module! Create a centralized repository of information, resources, and FAQs. Provide self-service support, enable quick problem-solving, and enhance customer satisfaction. Streamline knowledge sharing, improve productivity, and drive customer success with our comprehensive Knowledge Base Module.



UTILITIES

Optimize Your CRM Experience with Our CRM's Utilities Module! Unlock additional functionalities and tools to enhance your productivity. From data management to system customization, streamline your CRM operations and maximize efficiency. Take full advantage of our Utilities Module to supercharge your CRM experience and drive business growth.

Media: Share all forms of media files like images and videos among your staff.

Bulk PDF Export: Export reports and data in PDF format with ease in a single click.

CSV Export: Export reports and data in CSV format with ease in a single click.

Calendar: Schedule and set remainder of you tasks and progress.

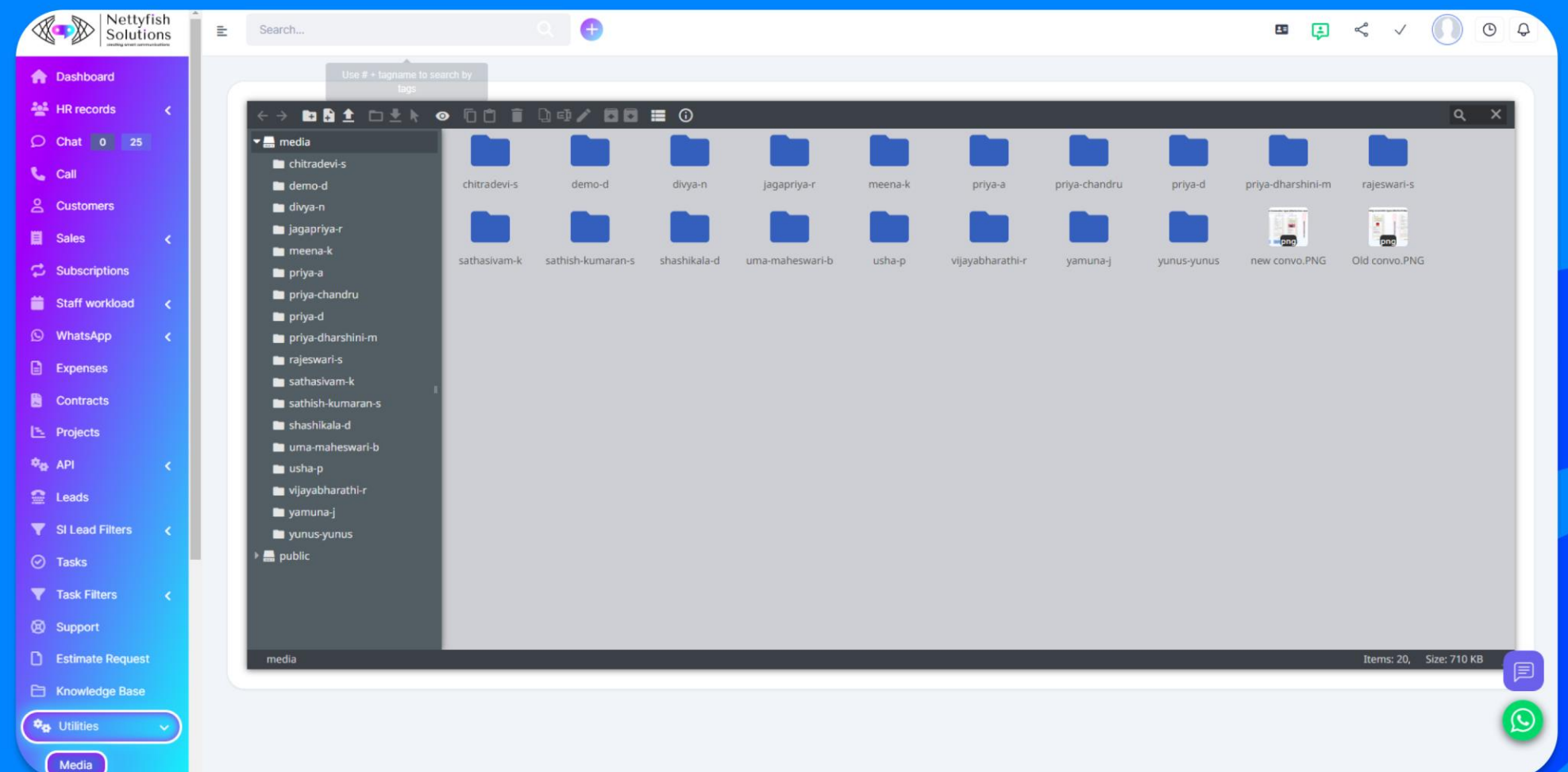
Announcements: Publish any new information/update to all your staff.

Goals: Set goals to your staff and track their achievements.

Activity Log: Track all progress and pending tasks.

Surveys: Share polls and surveys to get insights and improve efficiency.

Database Backup: Automated backup feature to secure your database.



REPORTS

Gain Powerful Insights and Drive Data-Driven Decisions with Our CRM's Reports Module! Access comprehensive reports and analytics to track performance, identify trends, and make informed business decisions. Visualize key metrics, measure success, and drive continuous improvement. Unlock the power of data with our robust Reports Module for enhanced business intelligence.

Sales: Gain deep visibility into your sales pipeline, track revenue, and analyze sales performance metrics. Identify trends, measure success, and make data-driven decisions to drive revenue growth.

Expenses: Track and analyze your business expenses effortlessly. Monitor spending, identify cost-saving opportunities, and streamline budget management. Visualize expense trends, generate comprehensive reports, and optimize financial decision-making.

Expenses vs Income: Compare and analyze your business expenses against income effortlessly. Gain valuable insights into profitability, cash flow, and financial health. Identify areas for improvement, optimize budget allocation, and drive financial success.

Leads: Track lead generation, measure conversion rates, and analyze lead performance metrics. Gain valuable insights into lead quality, campaign effectiveness, and sales pipeline.

Timesheets overview: Gain a comprehensive overview of employee timesheets, track work hours, and analyze productivity trends. Optimize resource allocation, streamline project management, and ensure accurate billing.

KB Articles: Measure the effectiveness of your knowledge base articles, track views, and analyze user engagement. Identify popular topics, improve content quality, and enhance customer self-service.

ADVANCED HR MODULE

Streamline HR Operations with Our CRM's Comprehensive HR Module! Effortlessly manage staff details, contracts, insurance information, shifts, salaries, and more all in one centralized platform. Empower your HR team with easy access to critical employee data, simplified contract management, and streamlined payroll processing. Gain a holistic view of HR activities with our intuitive overall dashboard. Simplify HR management, improve employee engagement, and enhance organizational efficiency with our robust HR Module. Experience the next level of HR management with our comprehensive and intuitive Advanced HR Module.

- Recruitment Management
- Profile Management
- Job Description
- Employee Contracts
- Training
- Workplace Management
- Onboarding
- HR Records
- Layoff Management
- Permission Management
- Payslips Management
- Timesheets and Leave Management
- HR Payroll
- OKRs – Objectives and Key Results



ADD ONS

Leads Filter: Refine Your Lead Management with Our CRM's Leads Filter Module! Streamline lead qualification and segmentation with advanced filtering options. Effortlessly sort and categorize leads based on specific criteria. Enhance lead targeting, improve sales efficiency, and boost conversions. Simplify lead management and drive business growth with our comprehensive Leads Filter Module.



Task Filter: Enhance Your Task Management with Our CRM's Task Filter Module! Easily filter and organize tasks based on priority, due date, and other criteria. Streamline task assignment, track progress, and improve team productivity. Simplify task management, stay organized, and drive successful project completion with our comprehensive Task Filter Module.



Staff Goals: Align and Achieve Business Objectives with Our CRM's Staff Goals Module! Set, track, and manage individual and team goals with ease. Foster employee motivation, improve performance, and drive success. Streamline goal management, enhance collaboration, and propel your business forward with our comprehensive Staff Goals Module.



WhatsApp API: Unlock the Power of WhatsApp Communication with Our CRM's WhatsApp API Module! Seamlessly integrate WhatsApp messaging into your CRM workflow. Enhance staff engagement, streamline communication, and drive rapid interactions. Leverage the popularity of WhatsApp for effective internal communication and business growth with our comprehensive WhatsApp API Module.



Staff Workload: Optimize Work Distribution and Enhance Productivity with Our CRM's Staff Workload Module! Efficiently manage and balance workload across your team. Visualize resource allocation, track task assignments, and ensure equitable work distribution. Streamline workforce management, improve efficiency, and drive optimal performance with our comprehensive Staff Workload Module.



Internal Web Chat: Streamline Internal Communication and Collaboration with Our CRM's Internal Web Chat Module! Connect and collaborate seamlessly with team members within your CRM platform. Foster real-time communication, share files, and resolve queries efficiently. Enhance teamwork, improve productivity, and drive successful outcomes with our comprehensive Internal Web Chat Module.



Internal Third-Party Chat: Enhance Collaboration with External Partners using Our CRM's Internal Third-Party Chat Module! Seamlessly connect and communicate with your staff on your CRM platform. Foster efficient collaboration, streamline discussions, and drive successful relationship. Simplify internal communication, strengthen relationships, and achieve shared goals with our comprehensive Internal Third-Party Chat Module. (WhatsApp, Facebook, Instagram, Twitter)



Appointment Module: Streamline Appointment Scheduling and Deliver Exceptional Client Experiences with Our CRM's Client Appointment Module! Easily manage client appointments, book time slots, and send automated reminders. Enhance client satisfaction, optimize resource allocation, and improve time management. Simplify appointment scheduling and elevate client interactions with our comprehensive Client Appointment Module.



Zoom Meeting Manager Module: Elevate Virtual Collaboration and Enhance Business Communication with Our CRM's Zoom Meeting Manager Module! Seamlessly integrate Zoom meetings into your CRM workflow. Schedule, host, and manage virtual meetings effortlessly. Improve team collaboration, strengthen client relationships, and drive remote productivity with our comprehensive Zoom Meeting Manager Module.



Team Password: The Team Password Module is a cutting-edge, self-hosted solution designed to simplify password management for companies. Safely share encrypted passwords with your team or clients, all protected by advanced access control measures. Enhance security, streamline collaboration, and maintain complete control over your sensitive data with this powerful team password manager.



SM Lead Management: The CRM's Social Media Leads Integration Module enables seamless synchronization of leads captured through your social media page's forms with your CRM's Leads module. Gain easy access to your pages and effortlessly sync custom fields between your CRM and channels. Enjoy the flexibility of using this module across multiple pages you manage, enhancing lead management and streamlining your workflow.



Pricing

Thank you!!!



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