

CORPOLEAD CRM



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PRESENTATION

What Is Corpolead?

Businesses in the modern world in order to operate efficiently and effectively, the operations carried out and the information on these operations must be properly managed. The CRM platform, which we have developed, aims to facilitate the transaction and data management process for businesses and give an impetus to its constant development by means of technological innovations and opportunities it encompasses.

The platform that we called "Corpolead CRM" is a CRM platform that has a parametric structure and can be easily adapted according to any business area. The platform has been developed by a local team, which in turn makes us available at all times and at the same time ensures our awareness of the local business needs.

Although "CorpoLead CRM" is simple in terms of connectivity and usage, it has a collection of modules consisting of 14 sections and can be used as CRM and ERP at the same time.

Modules of CorpoLead CRM

The platform consists of 11 main and 3 subsidiary modules.

Main modeules

Partners / Projects / Opportunities

Proposals / Orders / Purchases

Accounting / Products

Task / Events

Human Resources

Subsidiary modules

Users / User Activity

Settings

Dashboard and Notifications

Modules of CorpoLead CRM / Main modules

Partners

You can record the information about companies and people and can estimate your partnership with them. This section consists of 2 subsections: "Companies" and "Persons". "Companies" mean legal entities and individuals, but "Persons" are related people who are in touch with related companies.

Projects

The Projects section with rich functional capabilities is the first segment of the workflow, you can enter here the information about future or current projects (or campaigns) of the company you are managing. The projects you create register the work process to be carried out and can be associated not only with the existing partners, but also with the potential partners.

Opportunities

The second segment of the workflow is the Opportunities Section. Here you get the opportunity to register activities that you consider an opportunity for the business you manage, such as sales, incidents, events, tenders etc. As the name suggests, this section is used to register the initial stage of relations with partners. So, at this stage, you do not know whether you will appreciate the opportunity or whether the opportunity is suitable for making a proposal. In this case, the Opportunity is registered on the CorpoLead CRM platform and the "Responsible or Related person" from the sales or other relevant department you have assigned is appointed to this job. If successful, the transition to the next stage of the process is realized.

Modules of CorpoLead CRM / Main modules

Proposals

As is clear from the previous sections, the Proposals section is dynamically a part of the workflow and in addition to being related to other sections, as a hierarchy comes after the Opportunities section. You can design a proposal template for the company you want to make an offer according to your company's corporate identity and manage all your proposals automatically.

During the process of drafting of a proposal the platform combines functions such as single or two logo templates, automatic management of the unique number of proposal, sending to the customer's email, downloading in PDF format.

Orders

The orders section is the next segment of the workflow and a copy of the approved Proposals is copied to this section. Both the information coming directly from the Proposals section and the directly realized order data are collected in this section. In the orders section, you can view information about this order such as opportunity, proposal, product, note and responsible person.

Purchases

Although it is not directly involved in the workflow, this section, which is a part of it, is intended to regulate procurement processes. Generally consists of two parts, Purchases and Purchase Orders. Purchases - reflect the proposals collected based on your business's purchase need, and the purchase orders reflect the purchases you have confirmed. This also means that even unconfirmed purchase proposals will always be available to you.

Modules of CorpoLead CRM / Main modules

Accounting

The accounting section consists mainly of two sub-sections, Income and Expenses. In the workflow process, the information such as payment amounts for confirmed orders is automatically reflected in the Income section, and the payments such as Purchase orders or salaries are automatically reflected in the Expenses section. In addition, the automatically generated income/expense reports in this section will help you in collecting information about business accounting.

Products

This section is one of the important sections in the CorpoLead CRM platform for both work with the customers (CRM) and internal planning (ERP). Here you will add the products and services that belong to the company you are managing and lay the foundation for the automation process. Information such as the unit of measurement, number, price or code of the products you enter will automatically be actively used in Proposals or other sections related to work with customers.

Tasks

Here you can give tasks to employees, track these tasks, receive reports and share files among yourselves. The tasks you give can be assigned to any partner or project. At the same time, you can create tasks related only to you and plan the work to be performed. When you prepare the task that belongs only to you, other users will not see this task in the general list.

Modules of CorpoLead CRM / Main modules

Events

Events section is for registering the processes in which you are in a close relationship with your customers. In this section, you can organize meetings and sessions, share their addresses with your employees and collect information about the results of the events. The section consists of two sub-sections Events and Calendar. In the first sub-section, it is possible to enter event data, carry out operations on them, and in the second, without making any changes, to see the location of the events on the calendar.

Human Resources

This section is specially designed to manage the data of your company employees who are users of the platform and who are not. You can enter your employees' personal, educational, contact, work life information here. In addition, by means of this section, you can ensure that your employees are granted user status on the platform.

Modules of CorpoLead CRM / Subsidiary modules

Users

Users is the module needed to manage users and grant them permissions on operations. In this section, you can manage which section of CRM the user is allowed to use, view, create, edit and delete functions per sections.

The Human Resources section and the Users section are the sections that work parallel to each other. If a user is listed as a CRM user in the Human Resources section, you will also see this registration in the Users section. At the same time, if the User makes changes in his/her account, this change will be reflected in both modules.

User activity

This section is to register access times of CRM users to the platform and IP addresses. In other words, you will be able to see when your employee with user status enters the platform and in which section he/she is conducting the operation.

Settings

Management of parametric structure of the Corpolead CRM platform is carried out in this section. The goal here is to minimize the obstacles in front of you so that you can manage the platform as you want by adapting it to your own business. The parametric structure allows you to tailor the platform-registered standards, work statuses, accounting types and other information to your business.

Modules of CorpoLead CRM / Subsidiary modules

Dashboard and notifications

“CorpoLead CRM” platform is supplied with exclusive dashboard to analyze your business. There is original dashboard expressed current status of each sections besides with main dashboard on home page. These panels are updated by us invariably in consideration with frequency usage and needs of modern business.

Additionally, “CorpoLead CRM” platform is supplied with Notifications and Instant Messaging modules. Notifications module operates automatically, and in the act of assignment as Liable or Associated Person for modules by any user, notifications will be sent you both via platform and email. Instant Messaging module offers an opportunity to you for instant sharing information with contributors who have user status.

Advantages of CorpoLead CRM

Parametric structure

Our CRM software has a parametric structure. Whether you prepare your proposals in Azerbaijani manats or in American dollars, add your products in meter units or liters - the structure of "CorpoLead CRM" takes into account many units and standards, as well as allows users to add new units and standards to the platform. Even if there is a variable that we do not take into account, you can use this information by adding it to the platform.

Application of the most modern cloud technology

Cloud technology is a more efficient solution, as it is a technology that doesn't require installation and you pay as you use it. This means that it is possible to obtain high quality at a much more reasonable price. Cloud systems are constantly being updated within their scope, and therefore relieve customers from difficulties such as downloading a new version. You can access your data in this system from any location and device. The availability of the device on which a software was installed is not important. This makes your jobs manageable from your office, home, or other devices when you travel. Even if your computer or device is out of order, you can view your data, manage your affairs from other devices.

Cloud technology is no less secure than your servers. Because updates and security work are constantly conducted here. The risk of data loss or failure is minimal. Unlike your own server, back-up works in cloud technology are done more frequently.

Advantages of CorpoLead CRM

Accessible maintenance

You can always contact us via our technical support services and get help from our specialists. Since our CRM system does not require installation, we do not need to be next to the device used by every customer, and for this reason we can answer your questions online, solve your difficulties in a very short time.

Reasonable price policy

We offer much more reasonable price compared to our alternatives. Because we do not have any worries as installation or on-site support that require means. The concept of “pay as you use” furnished to us by cloud technology allows us to keep our prices at an appropriate level.

Constant and automatic updating of the platform

Unlike the installed programs, "CorpoLead CRM", which works on the cloud technology is updated by our programmers, users get immediately notified of these novelties and can use them. This also means that when any new module is available for use, you do not pay extra for this service nor expect it to be installed for use.

Obtaining CarpoLead CRM

Online sale

You can get an opportunity to use CarpoLead CRM platform without any restriction just by entering www.corpolead.com. There are suggested packages covering different amount of users and term.

CorpoLead CRM | Special

This product called “CorpoLead CRM | Special” is considered to be presented in a specially fitted format for some clients of standard CRM platform. Inasmuch as, CorpoLead team can supply new functionality with respect to your wish to CRM platform and can assist to turn an important part of your existing business processes.

The presented product is designed specifically for customers who have distinctive business specifications and model, want to keep their data not in cloud system, but their servers.

Firstly, for successful applying of "CorpoLead CRM | Special", objectives of Company are learned by our professional team. Then, necessary changes are operated in existing functionality in CRM platform. The duration of the project is determined at the first meeting with the customer because characteristics of the client's needs are the key factor.

Upon coordination and installation works, CorpoLead team work together in constant contact with customers and provides technical support to ensure the perfect functioning of the platform and new demands that may occur.

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Thank you

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