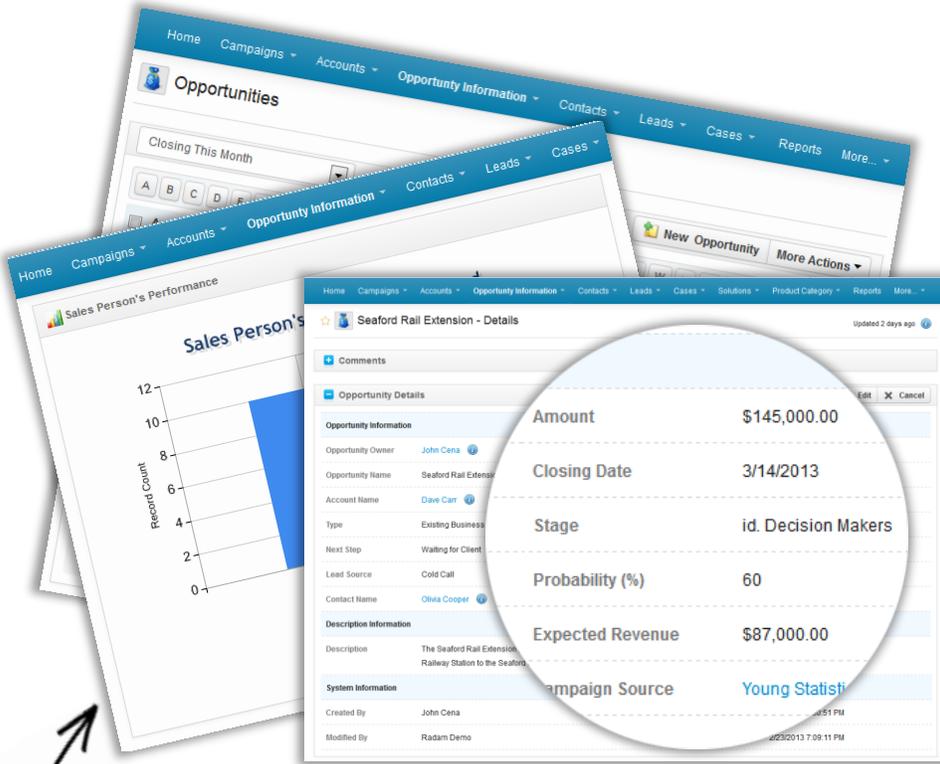# ACCELERATE SALES.

REACH NEW HEIGHTS.

Features Tour

- ✓ Lead Management
- ✓ Opportunity Management
- ✓ Contact Management
- ✓ Account Management
- ✓ Document Management
- ✓ Follow
- ✓ CRM & Sales Reports
- ✓ CRM & Sales Dashboard
- ✓ Email Integration
- ✓ Role Based Security
- ✓ Radam Custom Apps Integration

The Easiest CRM Solution on the Market is Now Integrated with Document Management

Know your customers better:

Record all your relationship with a customer and view all of the interactions in a single page.

Track your sales activities:

Record every phone call, email, meeting notes, Documents, To-do list, Comments, Description and much more.

Radam Follow :

Follow records that are most important to your business. Know your cold prospects. Follow-up and convert them to sales. You can identify bottlenecks in the sales process and take corrective action. Filter updates by users and modules.

* No Installation Cost   * Access Anytime, Anywhere   * No Data Lock up
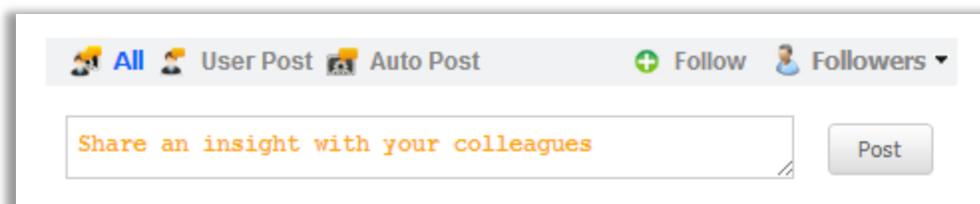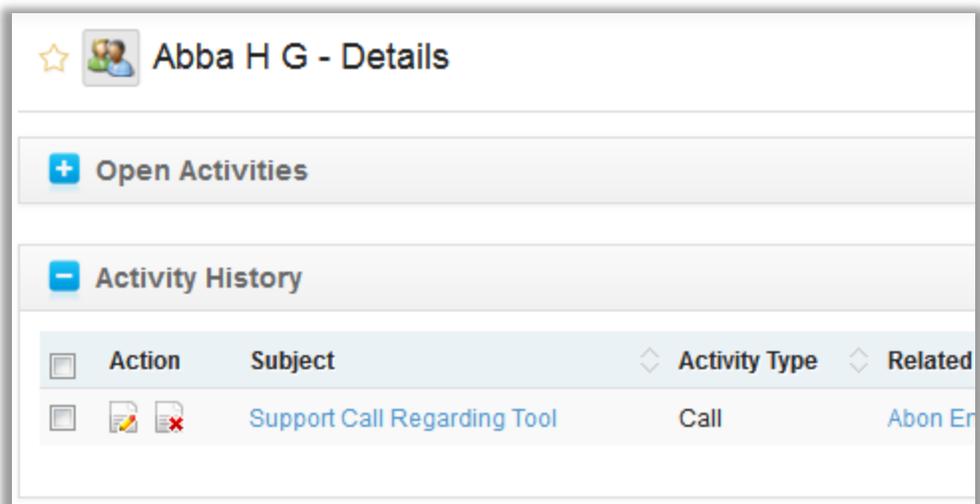
Home > Emails
Create

Send an Email

Centralize Emails

| Send | Cancel |

From : Bob@radamtech.com
To : Keith.seed@cciwa.com
CC :
BCC :
Related To : CCIWA Factory Shed Opportunity
Subject : Product Demo
Send a Copy : ⦿ Yes ○ No
Attachments : 📎 Attach Document

Organize all customer information and emails within your Excel CRM system. Easily switch between email and CRM modules within the same browser tab.

Manage Customer Accounts:

Monitor all customer accounts and related contacts, opportunities and developments from a shared database. View customers across products, geographies, account and status. Specify parent-child relationships between customer accounts and their subsidiaries or other divisions.

Drive and Convert Leads:

Automate the lead management process. Accelerate the speed from lead to deal. Import leads from external sources such as trade shows, seminars, direct mail, and other programs. Convert prospects into sales opportunities, accounts, and contacts with a single click. Customize sales processes to leverage your own best practices (B2B & B2C)

360 – degree view

Radam CRM gives you a 360-degree view of your complete sales cycle and pipeline. Identify trends, spot opportunities, increase efficiency and reduce costs with the right answers, right now.

Convert Lead

| Convert | Cancel |

Convert Lead : ABELE to equivalent Account , Contact and Opportunity
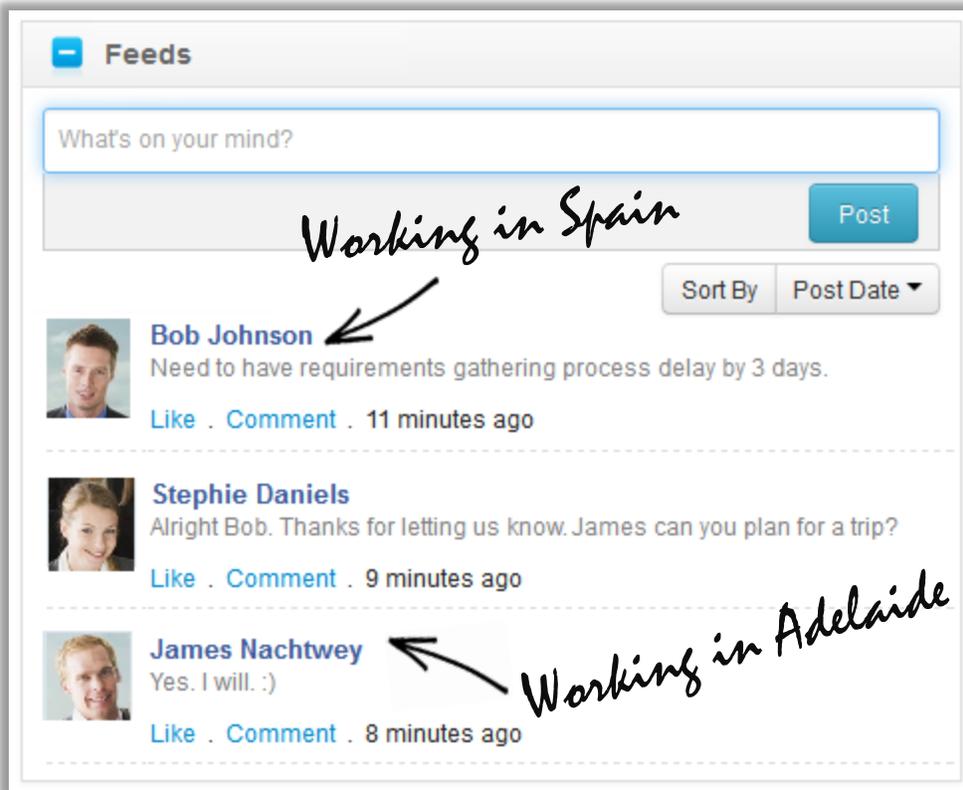
First Name   ADDIE

Last Name   ABELE

Opportunity Name   DHS Altona

Closing Date   07/31/2013

Stage   Prospecting

Amount   4500000

Account Name   Retail Technologies

RADAM EXCEL CRM
Customer Relationship Management

Increase internal communication:

Always be informed of your team and contacts. Never miss the important news.

Upcoming reminders:

Reminders which are due today or tomorrow are displayed at the right of Newsfeed page so that you will never forget to follow up.

Never worry about losing information:

Build a secure central hub of information/files and share them with your employees and outer world.
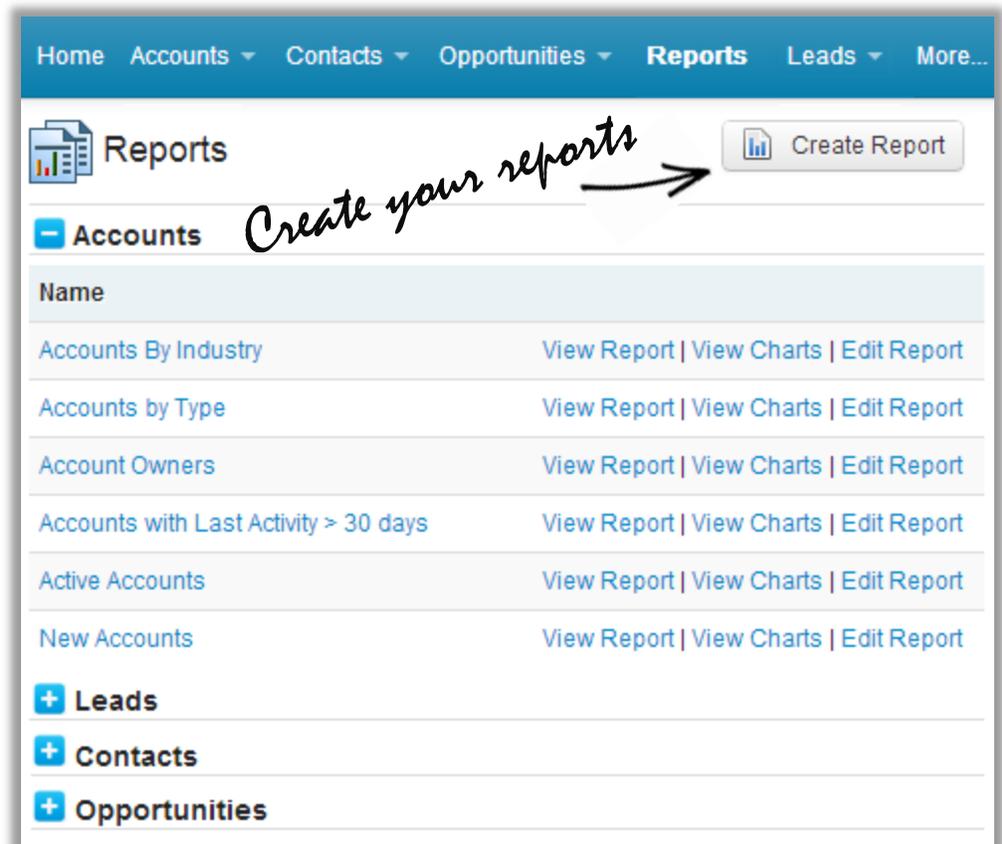
CRM Reports:

70+ standard CRM reports. Create cross-link reports spanning across multiple modules. Export sales report data to various user-friendly formats such as PDF, XLS and WORD

Security:

Excel CRM offers an Enterprise-grade security level to control the access rights of users while working with CRM data and modules such as leads, accounts, contacts, potentials etc. The security model includes

❖Profiles

❖Roles

❖Field-level security

❖Groups

Distribute and safely share proposals, competitor comparisons and similar documents to your Sales & Marketing team, right within Excel CRM. With Secure ECM the document management library, get easy and quick access to the important marketing collateral within your organization.

Share Content With The Right People:

Create folders, sub-folders and share collateral to your salespeople based on roles in the organizational hierarchy. Email proposals to your prospects by attaching documents from Secure ECM library or your local computer.
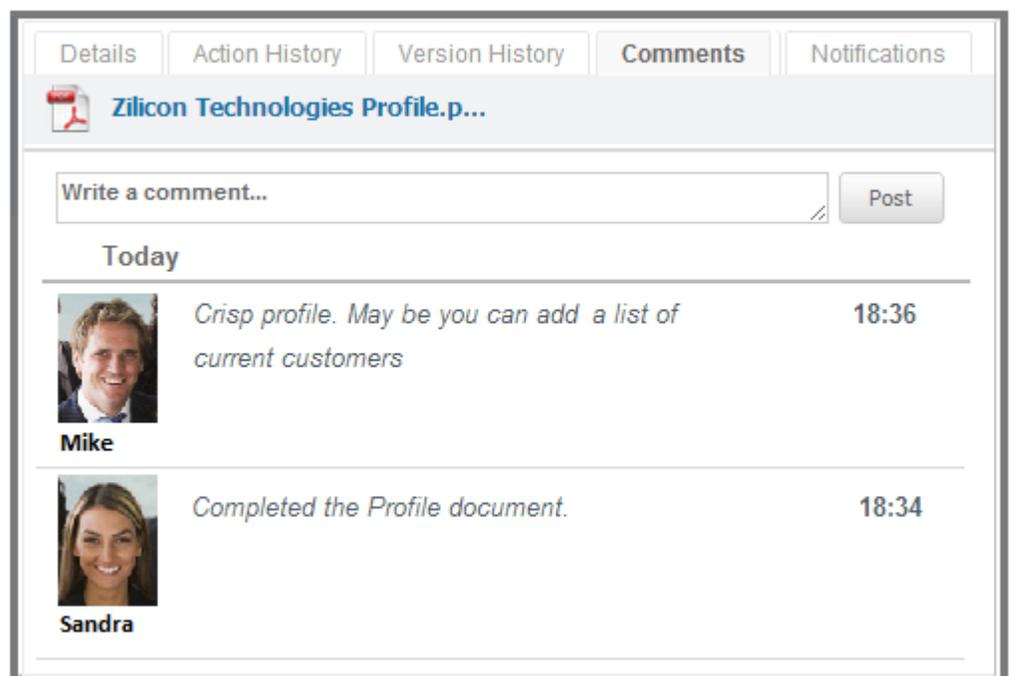
Automate. Avoid manual work. It's faster.

Reviews Made Easy:

Win more deals with improved quality of documents based on comments and feedback from your colleagues.

One Document. Multiple Versions :

Check out files from the document library, modify and check in to maintain multiple versions of your sales collateral in a central repository.

Bring more depth to CRM by Custom Apps:

One size can't fit all. Each industry vertical requires special business apps that can internally communicate with core CRM modules and improve the efficiency of business. Excel CRM bridges this gap by allowing you to build custom apps and integrate with CRM.

Integrate CRM Modules with Custom Business Apps:

Integrate your CRM-centric business applications instantly from Radam Custom Apps with Excel CRM. Turn on the additional business Apps to CRM users as per user permissions defined in the profiles.

Excel CRM

Custom App

SMARTEST CRM
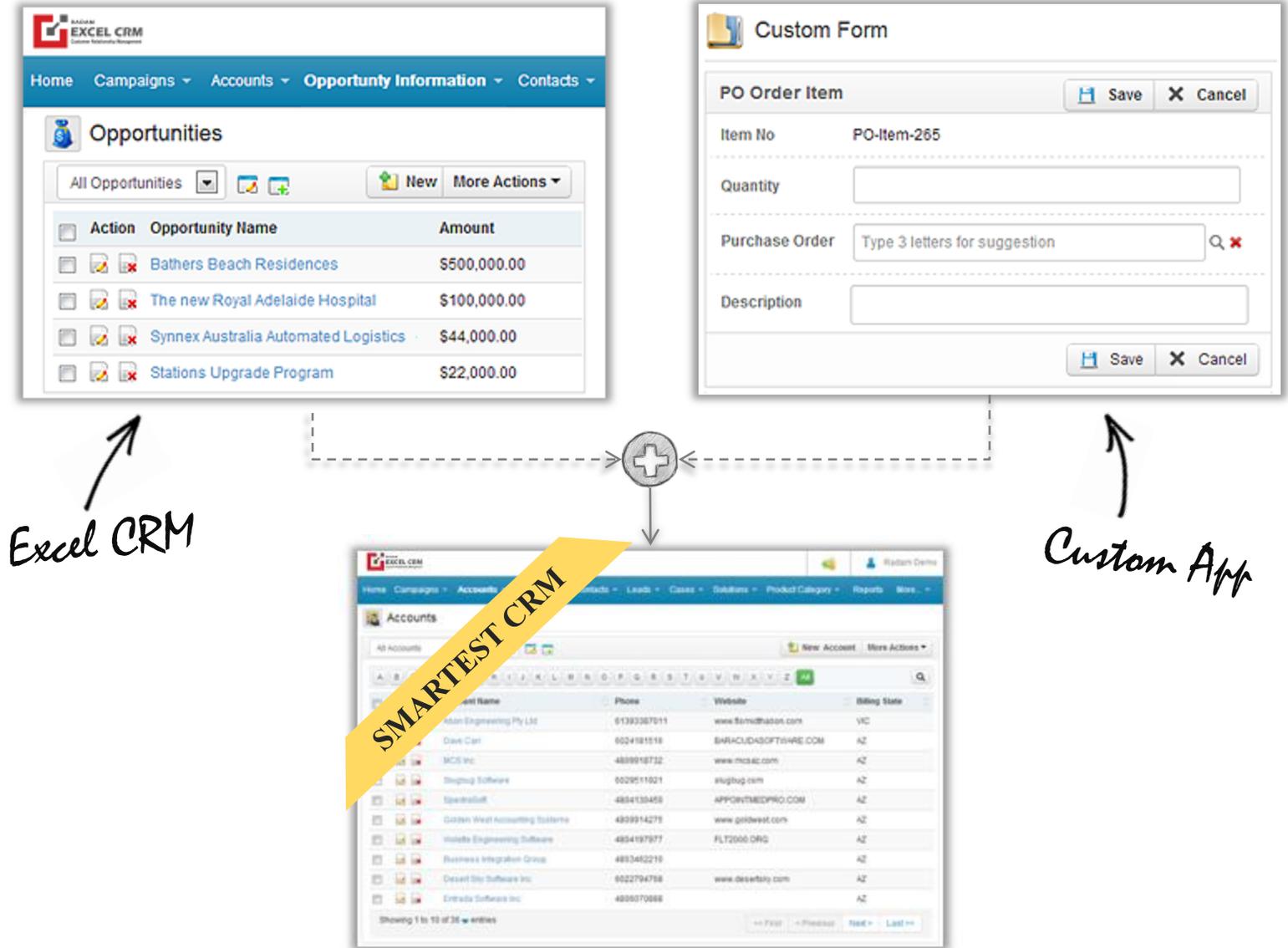
Make CRM experience simpler by grouping tabs:

Group modules into Sales, Marketing, Support, Finance, etc, and assign to your CRM users. With this your Sales & Marketing reps can quickly access data and more productive while interacting with prospects and customers.

Sample Custom Apps:

- ✓ Travel Expenses
- ✓ Payment Details
- ✓ Mortgage Calculator

- ✓ Sales Commissions
- ✓ Insurance
- ✓ Real-estate