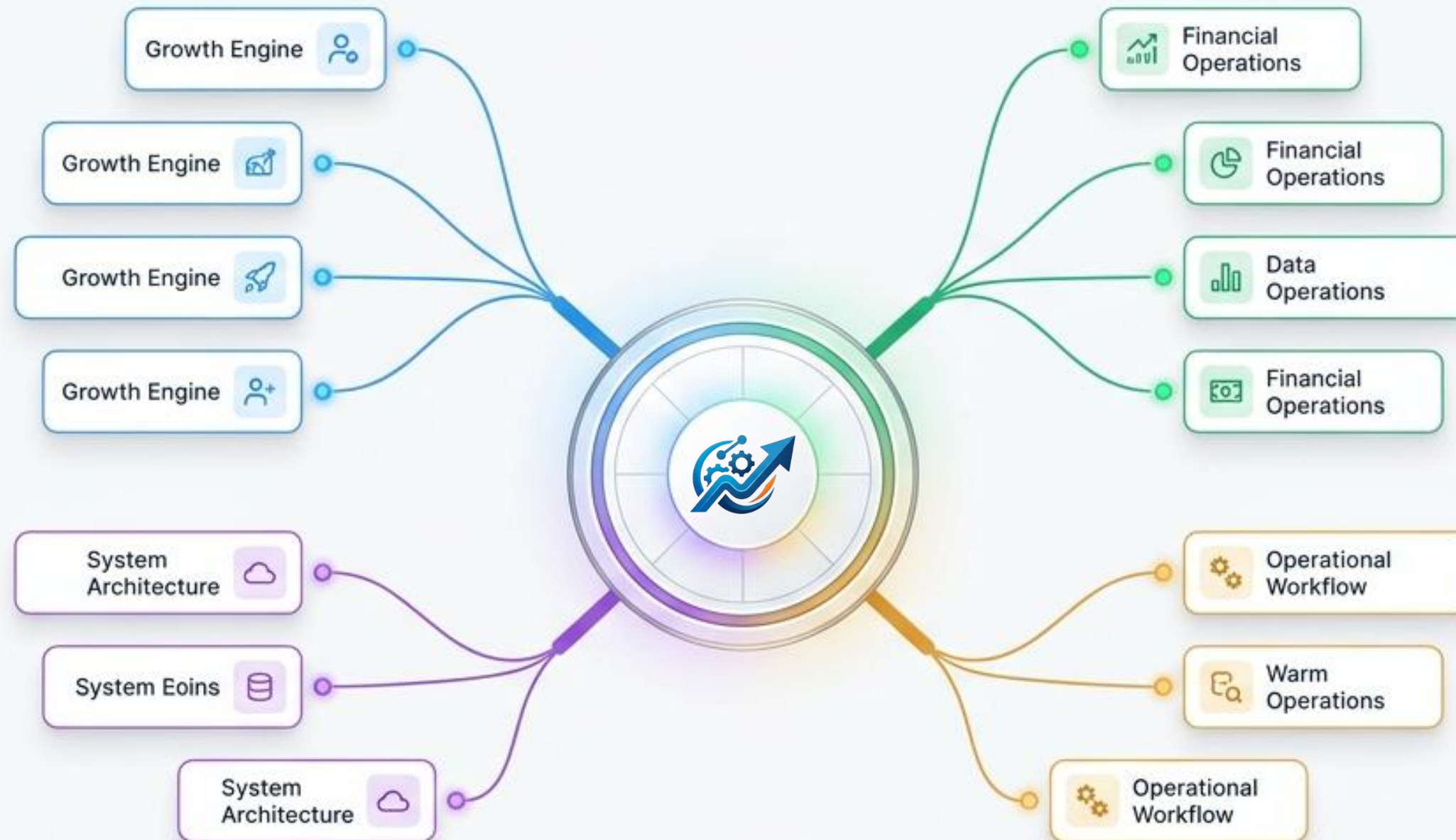




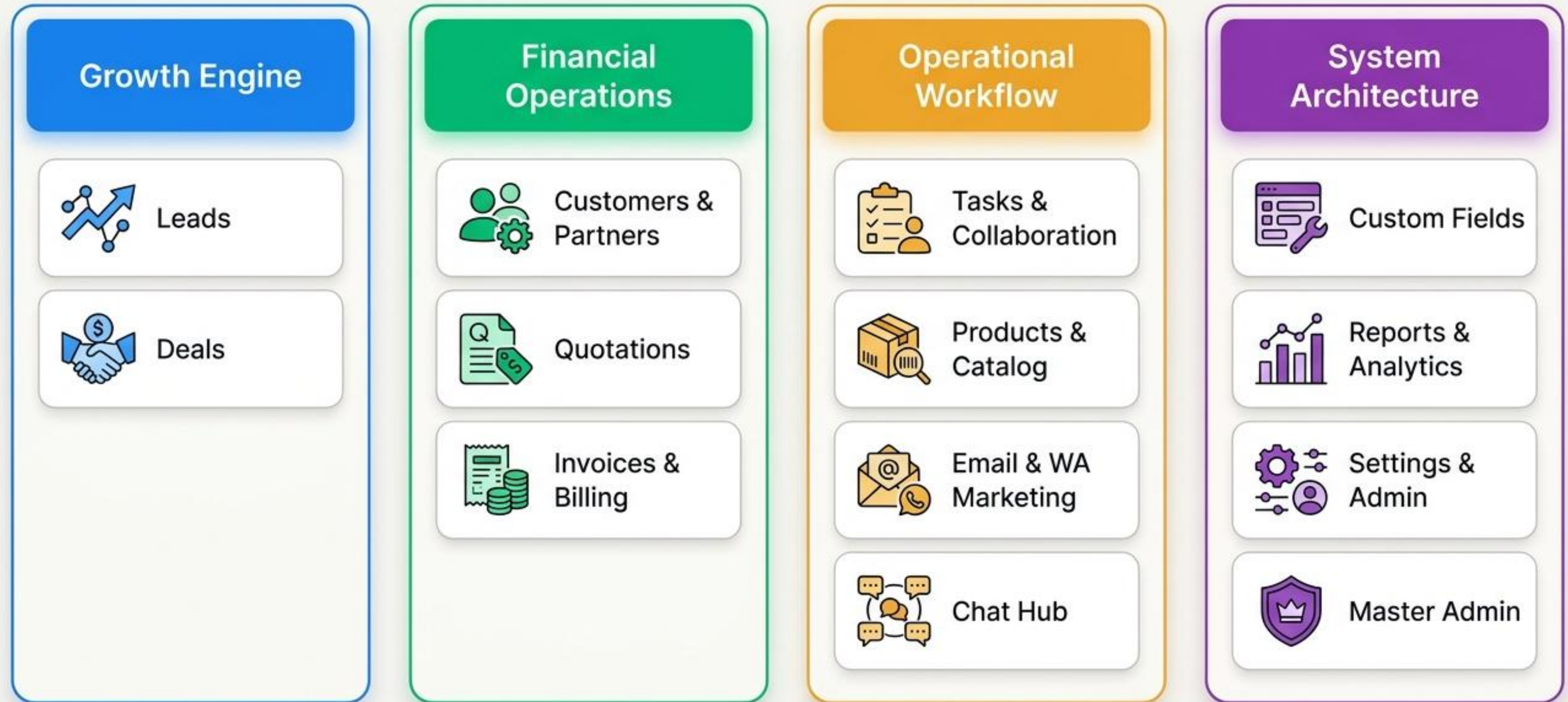
CRM PRO

A complete sales automation system

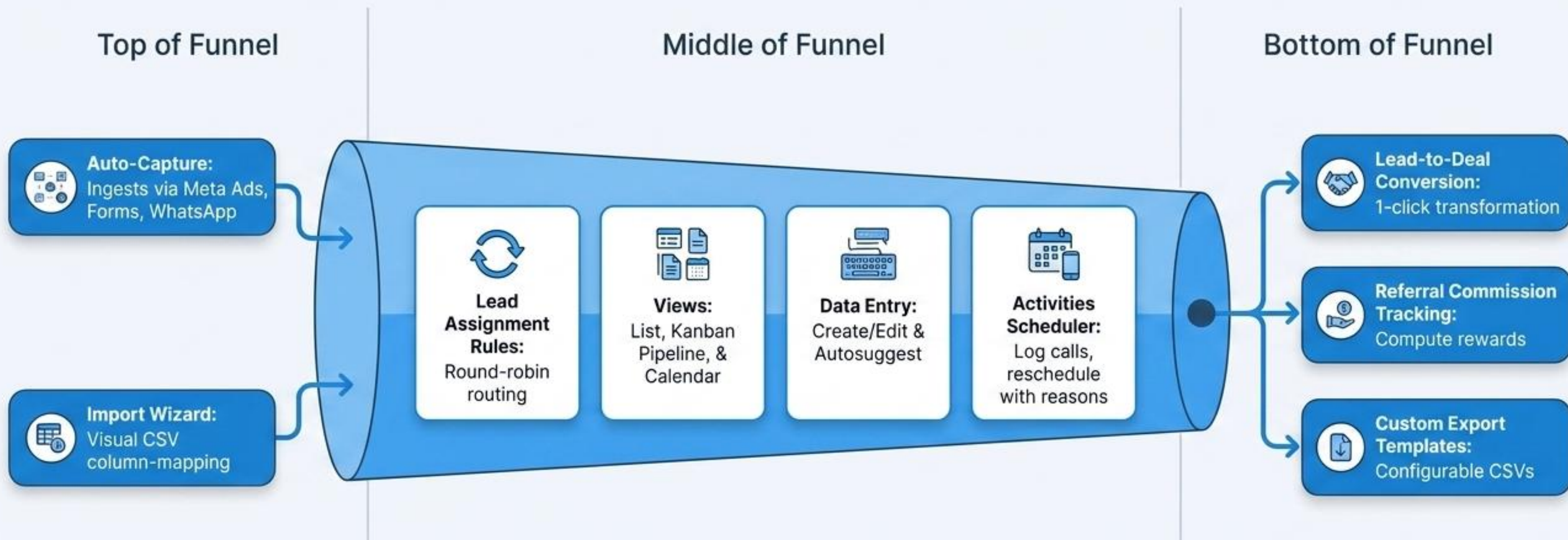
CRM Pro: The Platform Architecture

A comprehensive blueprint of the 14 modules and 64 features driving the CRM Pro ecosystem.

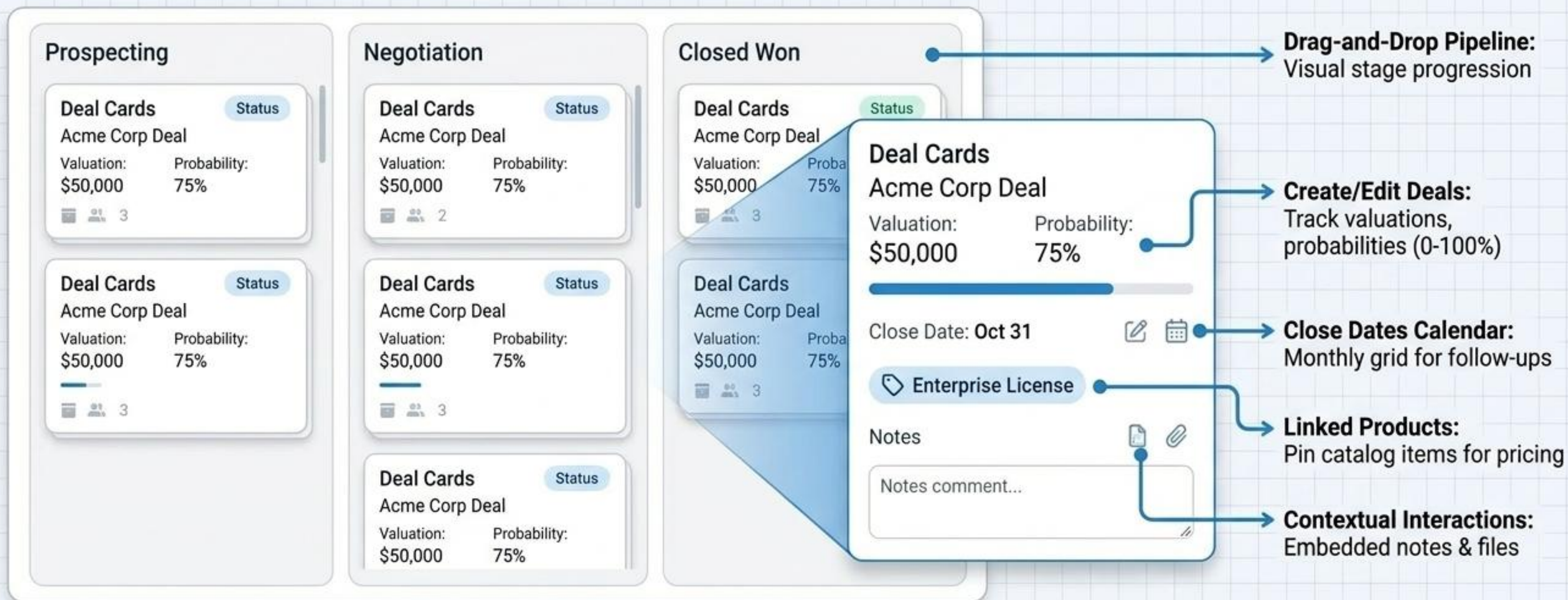
1 Platform. 14 Modules. 4 Architectural Pillars.



Pillar 1: Growth Engine | Lead Management



Pillar 1: Growth Engine | Deal Pipeline



Invoice Automation: Triggered on Closed Won



Referral Financial Ledger: Track Paid/Unpaid



Export Deals: Template CSV outputs

Pillar 2: Financial Ops | Customers & Partners

Profile View



Customer Profiles:

Permanent records with GSTIN, billing, and shipping details.

Segment Classification:

Differentiates regular accounts from strategic referral partners.

Customer Name:
Acme Corp

GSTIN:
27AAAAA0000A1Z5

Billing Address:
123 Business Park,
City, State, 500001

Shipping Address:
Same as Billing

Segment:
Strategic Partner

Account Status:
Active ●

Settings & Security

Allow Exports: ●
☐ [OFF]

Edit Permissions: ⓘ
☐ [Restricted]

Auto-Fill: ●
☒ [ON]

Billing Autosuggest:

Instant query and auto-fill during quote drafting.

Profile Security:

Hard-coded restrictions preventing reps from deleting or exporting (anti-theft).

Directory Export:

Full database CSV extraction (Admin only).

Export



Export Directory (CSV)

Pillar 2: Financial Ops | Quotes to Cash

The Quotation Desk

-  **Proposal Builder:** Assemble catalog items, taxes, discounts
-  **Prefix Counters:** Auto-generates IDs (e.g., QUO-)
-  **Status & Expiry Logs:** Track lifecycles
-  **Price Approval Verification:** Manager sign-off locks

1-Click Invoice
Conversion

Invoicing & Billing

-  **Invoicing Desk:** Tax-compliant generation
-  **TDS / TCS Support:** Withholdings & discounts
-  **Seq Delivery Challans:** Independent counters
-  **Payments Ledger:** Track bank wires & balances
-  **Role Isolation Security:** Complete invisibility for sales reps

Pillar 3: Workflow | Tasks & Collaboration

Multi-User Collaboration

One primary assignee linked with multiple active participant colleagues.



Task Manager: Set Priorities (Low, Med, High, Urgent)

Task Cross-Referencing

Hard-link tasks directly to Leads, Deals, Customers, or Projects.

Deadline Alerts

Real-time push tokens and chat notifications triggered by approaching due dates.

Pillar 3: Workflow | Products & Catalog



Catalog Management:

Centralize SKUs, cost/selling prices, and categories.

1



HSN Tax Codes:

Automated tax mapping for quotes/invoices.

2



Stock Control:

Quantity tracking with critical threshold alerts.

3



Custom Specifications:

Dynamic fields adapting by catalog category.

4



Vendor Database:

Preferred vendor assignment for rapid restocking.

5

- Dashboard
- Products
- Catalog
- Inventory
- Vendors
- Reports
- Settings

Search...

SKU	Product Name	Category	Stock Level	Cost Price	Selling Price	HSN Code	Status
SKU-1001	Enterprise Server X1	Hardware	50	\$4500	\$5800	8471	In Stock
SKU-1002	Cloud Storage Plan B	Services	Unlimited	\$150/mo	\$189/mo	9973	Active
SKU-1003	Office Productivity Suite	Software	200 Licenses	\$200	\$249	8523	Low Stock
SKU-1004	Custom API Integration	Services	Project	Quote	Quote	9983	Pending

Total Products
4,500

Low Stock
15

Total Inventory Value
\$12.5M

Product Specifications

Processor Type

Processor Type

Storage Capacity

License Type

Service Duration

Service

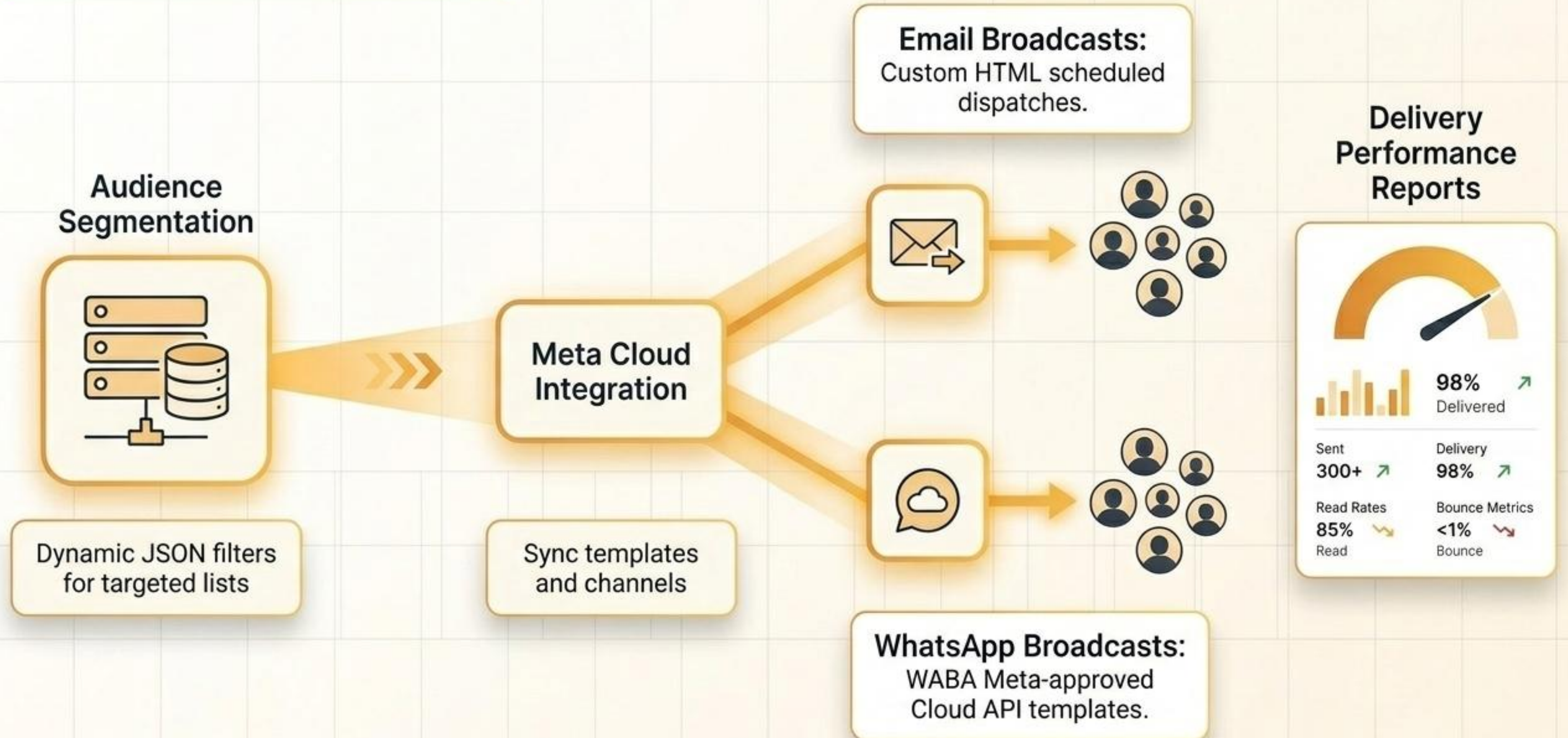
Preferred Vendors

Global Tech Supplies

Cloud Services Inc.

Software Solutions Ltd.

Pillar 3: Omnichannel | Marketing



Unified Inbox

1 **Unified WhatsApp Inbox**
Receive, read, and reply directly in CRM.

2 **Internal Messaging:**
DM threads and team group chat rooms.

3 **Pinned Contextual Rooms:**
Chat spaces bound to Deals, Leads, or Tasks.

5 **Call Registry:**
Log video/voice sessions, duration, and participants.

4 **Rich Media & Features:**
Attachments, replies, emojis, and read receipts.



Pillar 4: Architecture | Customization & Intelligence

Build - Custom Fields

Form Builder

Field Type

- Text
- Number
- Dropdown
- Date
- Checkbox

Dropzone

- Project Name
- Budget Amount
- Priority Level
- Due Date

Dynamic Schema Builder: Inject custom inputs into standard forms.

Order & Validation Controls: Enforce layout priorities and mandatory submission fields.

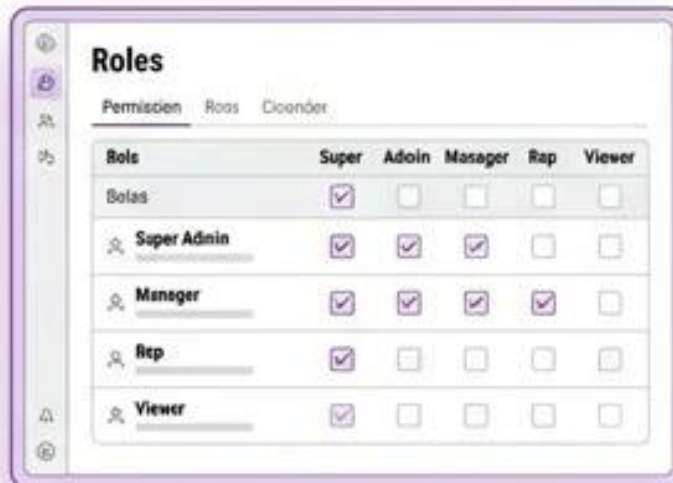
Measure - Reports & Analytics



Sales Dashboards: View monthly revenues, conversion rates, and agent performance.

Stagnation & Staging Reports: Bottleneck analysis showing stage drop-offs and time-to-conversion rates.

Advanced Settings



Roles	Super	Admin	Manager	Rep	Viewer
Basis	☒	☐	☐	☐	☐
Super Admin	☒	☒	☒	☐	☐
Manager	☒	☒	☒	☒	☐
Rep	☒	☐	☐	☐	☐
Viewer	☒	☐	☐	☐	☐

User Provisioning & RBAC

Grant Role-Based Access Control: Super Admin, Manager, Rep, or Viewer permissions.

Historical Retention

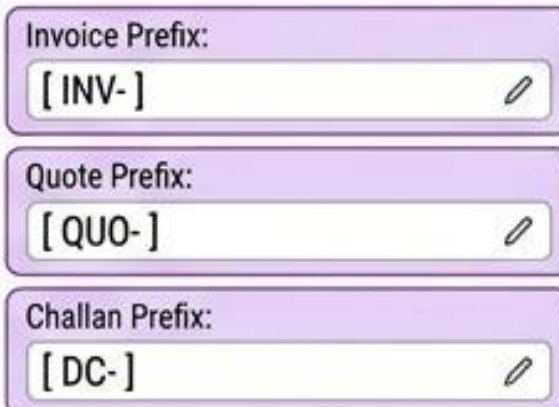
Terminate credentials by marking inactive, preserving pristine audit trails instead of deleting data.



Search	
User A	Inactive ☒
User B	Inactive ☐

Sequence Prefix Manager

Configure custom alphanumeric identifiers for invoices (INV-), quotes (QUO-), and challans (DC-).



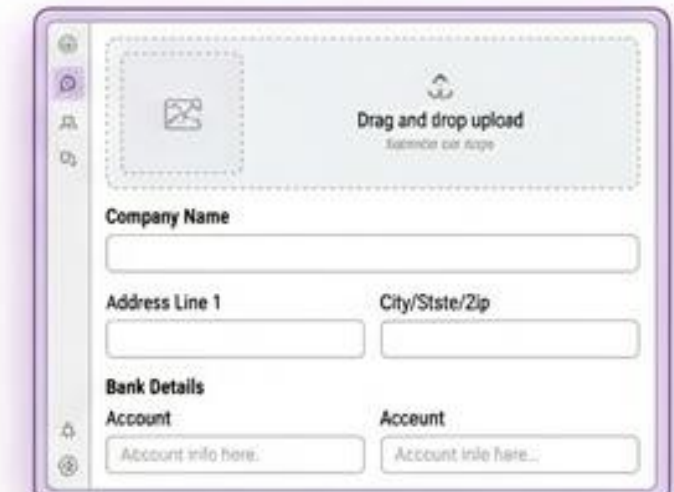
Invoice Prefix: [INV-]

Quote Prefix: [QUO-]

Challan Prefix: [DC-]

Company Branding Profile

Manage logo, address, and bank details for automated document printing.



Drag and drop upload

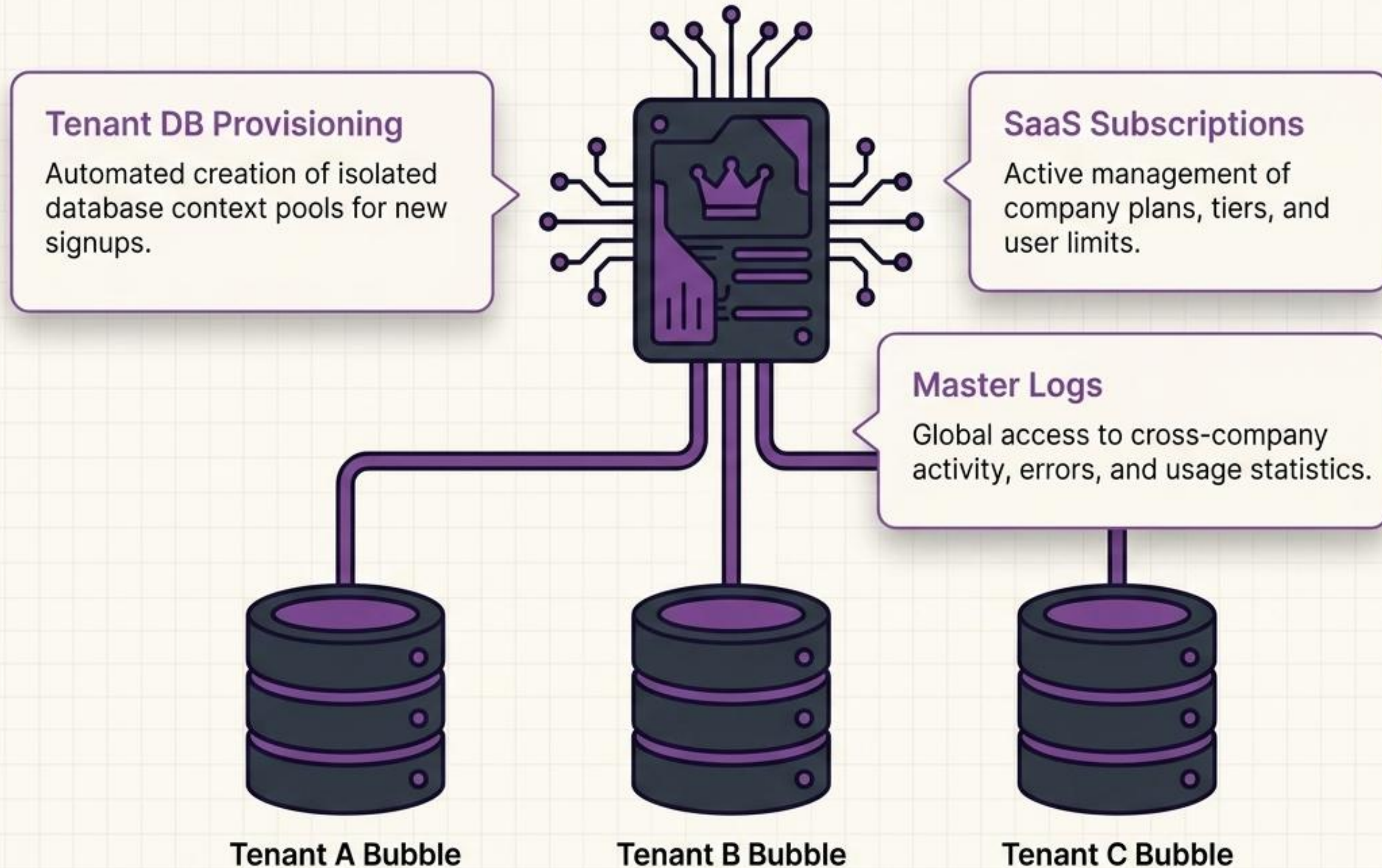
Company Name

Address Line 1 City/State/Zip

Bank Details

Account Account

Pillar 4: Architecture | Master Admin (Global)



Synthesis | Platform Accessibility Matrix



Module	Web-Only	Web & Mobile
Leads	•	✓
Deals	•	✓
Tasks	•	✓
Customers	•	✓
Chat	•	✓
Quotations	✓	•
Invoices	✓	•
Catalog	✓	•
Marketing	✓	•
Custom Fields	✓	•
Settings	✓	•
Master Admin	✓	•
Reports	•	✓
Collaboration	•	✓



1 Unified Platform. 14 Interconnected Modules. 64 Powerful Features.

From intelligent lead capture to multi-tenant architectural control, CRM Pro provides the complete operational command center for modern enterprise growth.