

# Empower Business through Customer Relationship Excellence

Intuitive interface. Scalable SaaS model. Improved ROI



SutiCRM-An easy to use and highly scalable cloud-based CRM solution that lets you leverage business opportunities and gain real-time insight to take immediate action, build strong relationships, and nurture leads, opportunities and customers.

## Dashboard and analytics provide insight and intuitive view



“

The software is configurable and allows me to manage leads and opportunities with ease. It's import and export capability are simple to use. Easy to update notes and follow tasks allow me to proactively follow-up with leads.

”

**Yanni Wang, VP of Finance,  
HMicro Inc**

## Enhance Marketing

- ✔ Organize client information and create campaign lists  
Send automated emails
- ✔ Manage relationships with customers and leads on social media such as Facebook, Twitter, LinkedIn and others
- ✔ Analyze trends and opportunities faster; Target audiences more accurately
- ✔ Improve campaign performance using the campaign ROI calculator

### Update Campaign

[Update](#) [Add Members](#) [View Members](#)

#### Campaign Information

Name	<input type="text" value="New Product Launch"/>	Type	<input type="text" value="Email"/>
Start Date	<input type="text" value="12/25/2015"/>	End Date	<input type="text" value="12/25/2015"/>
Code	<input type="text" value="New Product L-80-12/25/2015"/>	Status	<input type="text" value="Planning"/>
Sent	<input type="text" value="200"/>	Delivered	<input type="text" value="190"/>
Open Rate	<input type="text" value="180.0"/>	Click Through Rate	<input type="text" value="0.0"/>
Bounces	<input type="text" value="10"/>	Bounce Rate %	<input type="text" value="5.0"/>
Assigned To	<input type="text" value="Jason Roberts"/>		
Description	<input type="text" value="Created campaign on launching of new product version."/>		

#### Details

Reference Id	CMP004
Created By	Jason Roberts
Modified By	Jason Roberts
Created On	12/18/2015...
Modified On	12/18/2015...

# Increase Sales

- ✔ Capture leads with web-to-lead forms
- ✔ Simplify the sales process and make the most of every opportunity
- ✔ Gain enhanced visibility into your sales performance
- ✔ Store and access user data from a secure, single cloud source
- ✔ Optimize sales workflows that meet your unique business needs
- ✔ Automate sales reports and calculate earnings
- ✔ Forecast revenue opportunities periodically

Waterfall (USD)

Planned Revenues	20000.00	10000.00	25000.00	150000.00	1500.00	10000.00	2000000.00	3.00	1000.00	1250.00	1000.00	1000.00			
2017 CY	Jan2017	Feb2017	Mar2017	Apr2017	May2017	Jun2017	Jul2017	Aug2017	Sep2017	Oct2017	Nov2017	Dec2017	Cumulative Actual	Cumulative Planned	%Actual
Jan-2017	23265.00	0.00	0.00	1000.00	77.00	77.00	1200.00	2077.00	1077.00	1277.00	1077.00	1077.00	23265.00	20000.00	116.00
Feb-2017	23265.00	10580.00	0.00	1000.00	77.00	77.00	1200.00	2077.00	1077.00	1277.00	1077.00	1077.00	33845.00	30000.00	112.00
Mar-2017	23265.00	10580.00	27425.50	1000.00	77.00	77.00	1200.00	2077.00	1077.00	1277.00	1077.00	1077.00	61270.00	55000.00	111.00
Apr-2017	23265.00	10580.00	27425.00	163016.00	77.00	77.00	1200.00	2077.00	1077.00	1277.00	1077.00	1077.00	224286.00	205000.00	109.00
May-2017	23265.00	10580.00	27425.00	163016.00	77.00	77.00	1200.00	2077.00	1077.00	1277.00	1077.00	1077.00	226097.00	206500.00	109.00
Jun-2017	23265.00	10580.00	27425.00	163016.00	77.00	77.00	1200.00	2077.00	1077.00	1277.00	1077.00	1077.00	236902.00	216500.00	109.00
Jul-2017	23265.00	10580.00	27425.00	163016.00	77.00	77.00	1200.00	2077.00	1077.00	1277.00	1077.00	1077.00	2271289.00	2216500.00	102.00
Aug-2017	23265.00	10580.00	27425.00	163016.00	1811.00	10805.00	2034387.00	4.00	1077.00	1277.00	1077.00	1077.00	2271293.00	2216503.00	102.00
Sep-2017	23265.00	10580.00	27425.00	163016.00	1811.00	10805.00	2034387.00	4.00	1077.00	1277.00	1077.00	1077.00	2271293.00	2217503.00	102.00
Oct-2017	23265.00	10580.00	27425.00	163016.00	1811.00	10805.00	2034387.00	4.00	1077.00	1277.00	1077.00	1077.00	2271293.00	2218753.00	102.00
Nov-2017	23265.00	10580.00	27425.00	163016.00	1811.00	10805.00	2034387.00	4.00	1077.00	1277.00	1077.00	1077.00	2271293.00	2219753.00	102.00
Dec-2017	23265.00	10580.00	27425.00	163016.00	1811.00	10805.00	2034387.00	4.00	1077.00	1277.00	1077.00	1077.00	2271293.00	2220753.00	102.00

\* Note:  
 Color : Forecast Values    Color : Actual Sales <= Planned Revenue    Color : Actual Sales > Planned Revenue    Color : Planned Revenues

## Offer world-class customer service

- ✓ Automated workflows to manage customer issues and challenges
- ✓ Communicate on critical customer service metrics
- ✓ Create knowledge base for immediate resolution
- ✓ Collaborate with other parties and work as a team
- ✓ Create and manage contracts for customers. Renew contracts automatically
- ✓ Global activity management and service support tools

### Update Case

Update

#### Case Information

Subject	Having trouble adding new items	Status	Closed
Assigned To	Karen Miller	Contact	C0085-Collin Mitts
Opportunity	OP0073-Smith & Sons	Account	A0083-Smith & Sons
Reported By	Case Reported By	Email	mitts@sns.com
Phone	654564654	Product	Invoice Solution
Priority	Medium	Type	New Feature
Origin	Phone	Reason	Existing problem

#### Details

Reference Id	CA00101
Created By	Jason Roberts
Modified By	Jason Roberts
Created On	12/18/2015 18:05...
Modified On	12/20/2015 22:33...

#### Comments

Description	This case was reported by Mitts.
-------------	----------------------------------

Get your **FREE TRIAL** of SutiCRM

Free Trial

Phone: 650-969-7884

Email: sales@sutisoft.com

