

CUSTOMER RELATIONS CRM

CUSTOMER RELATIONS MANAGEMENT



What we can do for you :

Consulting



And Go-To-Market methodology: We present you our solutions, you decide which one is the best one for you.

Introduction Migration



Implementing our CRM-System is quick and easy; for a efficient usage right from the very beginning.



We are happy to migrate your data from any other CRM systems and support you during the implementation.

Integration



We integrate your CRM for you into third-party systems and ensure an automated exchange of your data.

Support



We will support you also after the implementation. We continuously develop and improve your solution.

CloudMonkiCRM is more than a CRM and offers many **advantages** for SMEs and Start-ups



Low introduction costs and short time-to-market



Plannable, low costs



100% Open Source, therefore extendable and tailored to individual modules



customisable entities, layouts, workflows and reports



Methodology & Consulting

- ✓ Platform-independent and mobile use
- ✓ Modern, user-friendly and responsive platform
- ✓ Compatible for B2B and B2C, use across many industries
- ✓ Own API integration: possibility with other third-party systems
- ✓ Functional, directly out-of-the-box with many corporation features
- ✓ History and change log tracking
- ✓ Role-based authorisation on organisational and field level
- ✓ Extremely fast due to the use of latest technologies
- ✓ Active continuous development
- ✓ Available when and wherever needed (smart phone, laptop, PC, tablet etc.)
- ✓ Consistent for community and enterprise customers
- ✓ Unlimited number of users and multiple language selections

FACTS



....more than 50.000 businesses worldwide use CRM

...in 163 countries.

163



...continuously developed and improved since 2016

with CRM you benefit from...

300%

increase of lead-conversion rate

41%

profit increase per sales employee

23%

reduction in sales and marketing expenses

27%

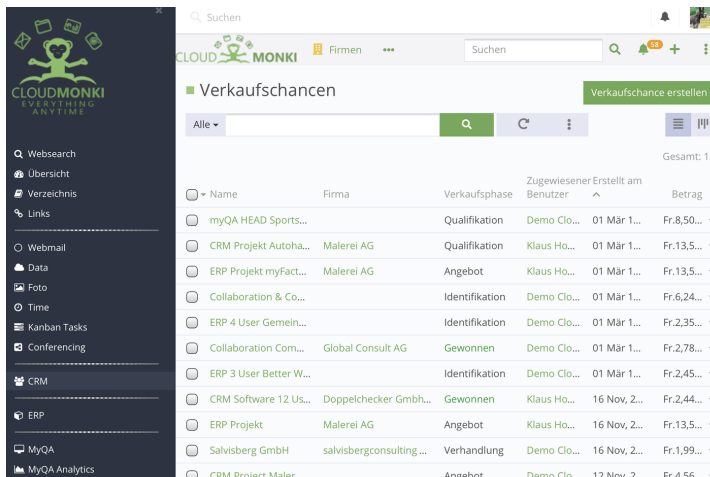
improvement of customer retention

Save time and be more efficient

CloudMonki CRM automates business processes in sales, marketing and support, this saves your employees' time

Sales Automation

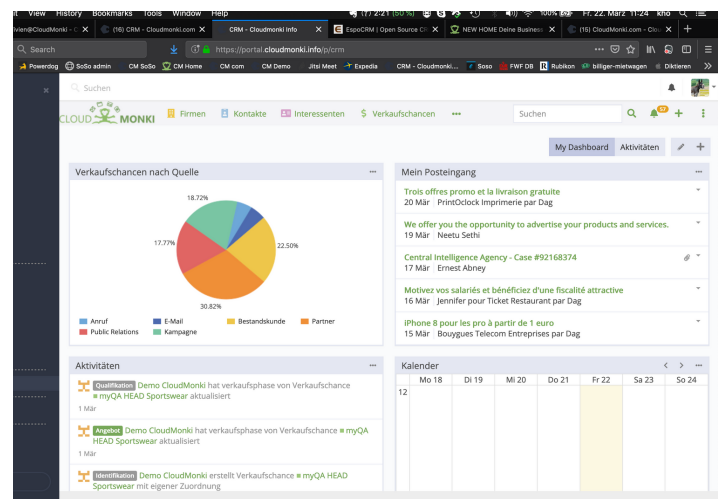
- ✓ Leads
- Sales Opportunities
- Companies
- Contacts
- ✓ Conversion of leads into sales opportunities, Companies and contacts
- ✓ Products, services, offers and invoices



Name	Firma	Verkaufschance	Zugewiesener Benutzer	Erstellt am	Betrag
myQA HEAD Sports...		Qualifikation	Demo Clo...	01 Mär 1...	Fr.8,50...
CRM Projekt Autoha...	Malerei AG	Qualifikation	Klaus Ho...	01 Mär 1...	Fr.13,5...
ERP Projekt myFact...	Malerei AG	Angebot	Klaus Ho...	01 Mär 1...	Fr.13,5...
Collaboration & Co...		Identifikation	Demo Clo...	01 Mär 1...	Fr.6,24...
ERP 4 User Gemein...		Identifikation	Demo Clo...	01 Mär 1...	Fr.2,35...
Collaboration Com...	Global Consult AG	Gewonnen	Demo Clo...	01 Mär 1...	Fr.2,78...
ERP 3 User Better W...		Identifikation	Demo Clo...	01 Mär 1...	Fr.2,45...
CRM Software 12 Us...	Doppelchecker GmbH...	Gewonnen	Klaus Ho...	16 Nov, 2...	Fr.2,44...
ERP Projekt	Malerei AG	Angebot	Klaus Ho...	16 Nov, 2...	Fr.13,5...
Salvisberg GmbH	salvisbergconsulting ...	Verhandlung	Demo Clo...	16 Nov, 2...	Fr.1,99...
CRM Project Maler ...		Angebot	Demo Clo...	12 Nov, 2...	Fr.4,56...

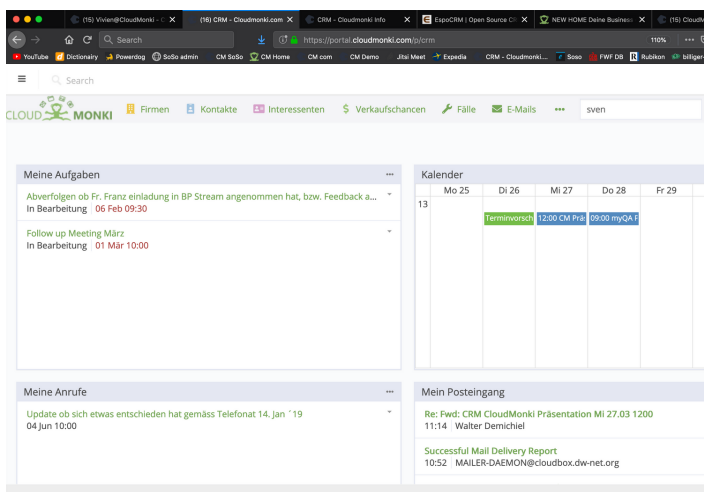
Marketingautomatisierung

- ✓ Campaigns incl. log analysis
- ✓ Target audiences can be synchronised with selected reports
- ✓ E-Mail marketing with the feature to in- or exclude target audiences
- ✓ E-Mail integration



Customer Support

- ✓ Case management – so no issue gets missed
- ✓ E-Mail-to-Case cases can automatically be opened up from another E-Mail
- ✓ Knowledge Data-Base: All important information in one place
- ✓ Customer portals



Meine Aufgaben

- Abverfolgen ob Fr. Franz einladung in BP Stream angenommen hat, bzw. Feedback a... In Bearbeitung 06 Feb 09:30
- Follow up Meeting März In Bearbeitung 01 Mär 10:00

Kalender

Mo 25	Di 26	Mi 27	Do 28	Fr 29	Sa 30
		Terminvorsch 12:00 CM Prä	09:00 myQA		

Meine Anrufe

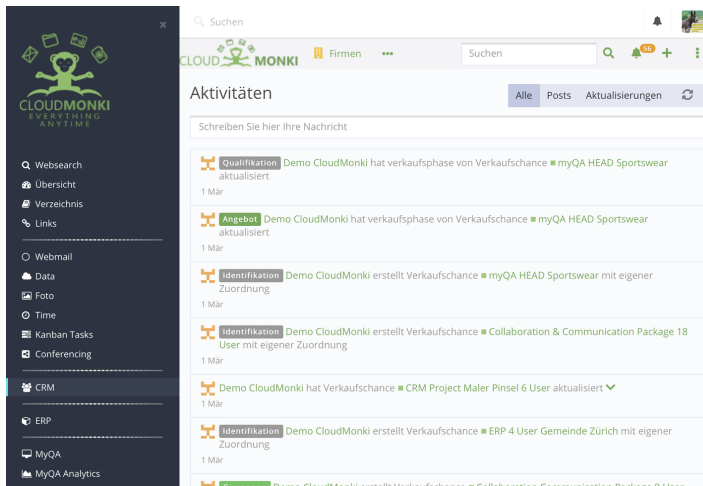
- Update ob sich etwas entschieden hat gemäss Telefonat 14. Jan '19 04 Jun 10:00

Mein Posteingang

- Re: Fwd: CRM CloudMonki Präsentation Mi 27.03 12:00 11:14 - Walter Demichiel
- Successful Mail Delivery Report 10:52 - MAILER-DAEMON@cloudbox.dw-net.org

CloudMonki CRM **increases productivity** and work quality, systemises and structures information exchange

ACTIVITIES AND COMMENTS

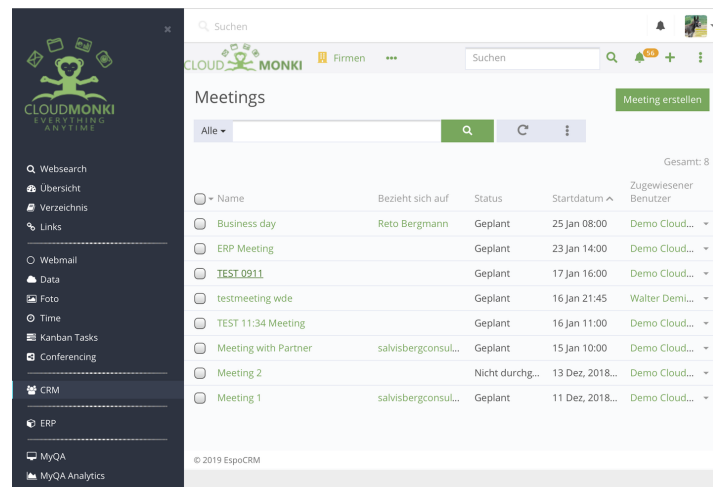


✓ Every change is documented in the activity stream, including information which user made what kind of change and when. You can also see the former value and track everything.

✓ You can also include comments with attachments and dates in the timeline

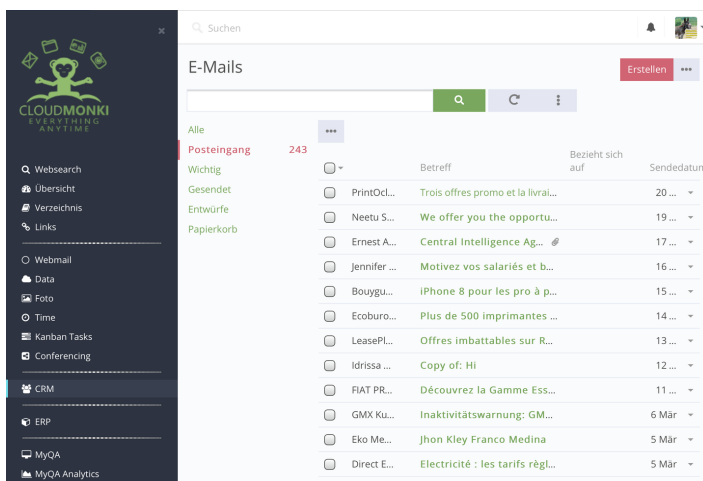
PRODUCTIVITY AND TEAM WORK

- ✓ Meetings and calls with list of participants
- ✓ Tasks with status, priority and deadline
- ✓ Invitation and calendar sharing
- ✓ System notifications
- ✓ Documents and document files
- ✓ Synchronise Google calendar and contacts



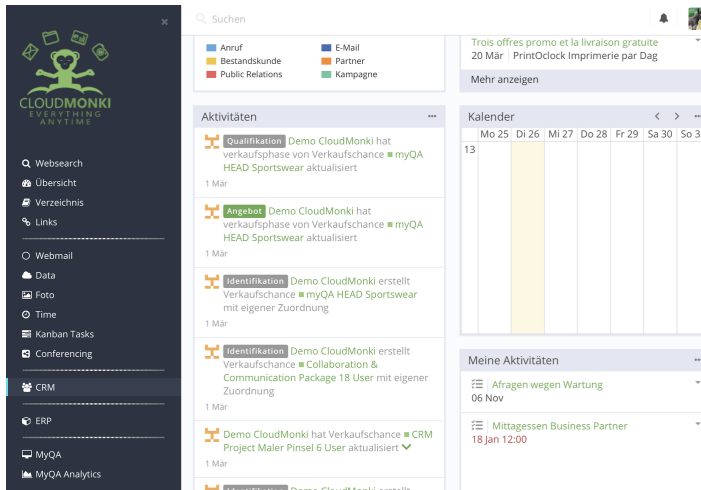
E-MAILS

- ✓ One or more personal E-Mail-Accounts per user
- ✓ Shared E-Mail-Accounts
- ✓ Incoming and outgoing E-Mails are automatically grouped with connected entries
- ✓ Full-featured E-Mail Management: E-Mail templates, files, signatures, filter, circular mails



Business processes, entities and layouts can be customised easily, intuitively and without any coding knowledge

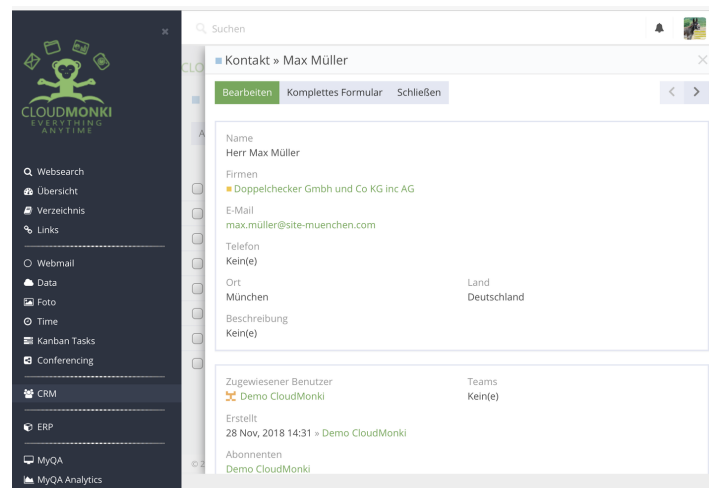
WORK FLOW CONFIGURATION



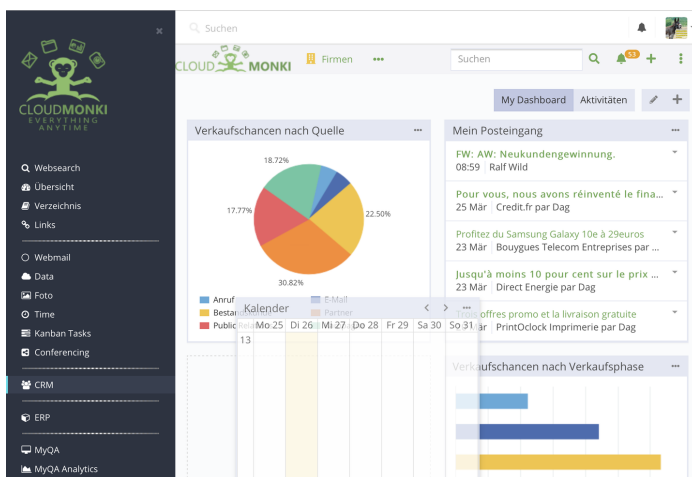
- ✓ Configuration of rules for event-driven actions
- ✓ Consideration of conditions ("and", "or") and linkage of rules
- ✓ Possible events: create, edit an entry due to a scheduled event or similar
- ✓ Possible actions: send E-Mail, create or edit data entry, create notification, create or delete relation, assign data entry, etc.

CONFIGURATION OF RECORDS

- ✓ Existing records can be customised
- ✓ You can create your own record
- ✓ Every record can be extended by creating new fields, edit existing ones or define relations
- ✓ Different data types for fields, which are validated automatically according to the data type



LAYOUT CONFIGURATION



- ✓ Customise layouts with Drag & Drop
- ✓ Configuration of field groups
- ✓ All configured layouts are responsive and accessible on smart phones and tablets
- ✓ Dynamic field logic
- ✓ Customisable filter options
- ✓ Mass updates

CRM helps to control the **achievement of goals** by analyzing information from configured reports and dashboards

REPORTING

- ✓ View reports as grids or lists
- ✓ Reports allow data to be aggregated, filtered and sorted, as well as presenting the results in the form of different graph types
- ✓ Configuration of report contents
- ✓ Run time parameter

The screenshot displays a CRM task management interface. At the top, there's a header 'Aufgaben' with a search bar, filters, and a 'Neue Aufgabe' button. Below this is a table of tasks with columns: Name, Status, Priorität, Fällig am, and Zugewiesener Benutzer. The table shows three tasks: 'Dokumentation fertig machen', 'Mittagessen Business Partner', and 'Afragen wegen Wartung'. Below the table, there's a section titled 'Aufgaben' with a filter for 'Gesamt: 3'. This section shows a detailed view of the task 'Mittagessen Business Partner' with its status 'Normal' and due date '18 Jan 12:00'. It also shows a task 'Afragen wegen Wartung' with status 'Normal' and due date '06 Nov'.

Name	Status	Priorität	Fällig am	Zugewiesener Benutzer	Erstellt am
Dokumentation fertig machen	Zurückges...	Normal	24 Jan	Demo Clo...	19 Jan 10:45
Mittagessen Business Partner	Nicht beg...	Normal	18 Jan 12:00	Demo Clo...	14 Jan 09:11
Afragen wegen Wartung	In Bearbei...	Normal	06 Nov	Demo Clo...	20 Dez, 20...

Name	Status	Priorität	Fällig am
Mittagessen Business Partner	Normal		18 Jan 12:00
Afragen wegen Wartung	Normal		06 Nov

MULTIPLE DASHBOARDS

- ✓ Dashboards are freely configurable for each user
- ✓ You can setup several dashboards
- ✓ Widgets can be positioned using simple drag & drop (Sales Funnels, Activity Stream, My Tasks, My Meetings, etc.)
- ✓ Additional configuration partner for each widget

REST API

- ✓ fully automated data exchange with any third party system or app possible

Therefore our CRM can be connected to:

- op systems
- ERP-Systems
- Book keeping software
- Work-flow management software
- Other web applications

ENTERPRISE FEATURES

- ✓ Management of several organisations in one installation
- ✓ LDAP authentication available
- ✓ Portals
 - Multi-currency and foreign exchange rates
 - Change log
 - Data import and export
 - VOIP integration
 - Diagrams for reports
- ✓ Call centre integration

BERECHTIGUNGSKONZEPT

- ✓ User, teams and roles
- ✓ One user can be assigned to several teams
- ✓ Authorisation on an entity and field level
- ✓ Access records: Access to own records, to records of team members or for all,...



CloudMonki CRM **goes beyond CRM** and can even cover processes from other areas

Why choose CloudMonki?

- + Work on any device, whenever and wherever you want
- + The solution with minimal implementation effort
- + Have more time for the essential
- + Over 6 years implementation experience
- + High customer satisfaction
- + We use our CRM ourselves



Contact

Give us a call or write to us!



Customer Service

Hotline: +41 76 610 8303



CloudMonki G.m.b.H.

Alte Steinhauser Strasse 19
6330 Cham (CH)
Tel: +41 44 586 37 88

Visit our website today:

<https://www.cloudmonki.com>

