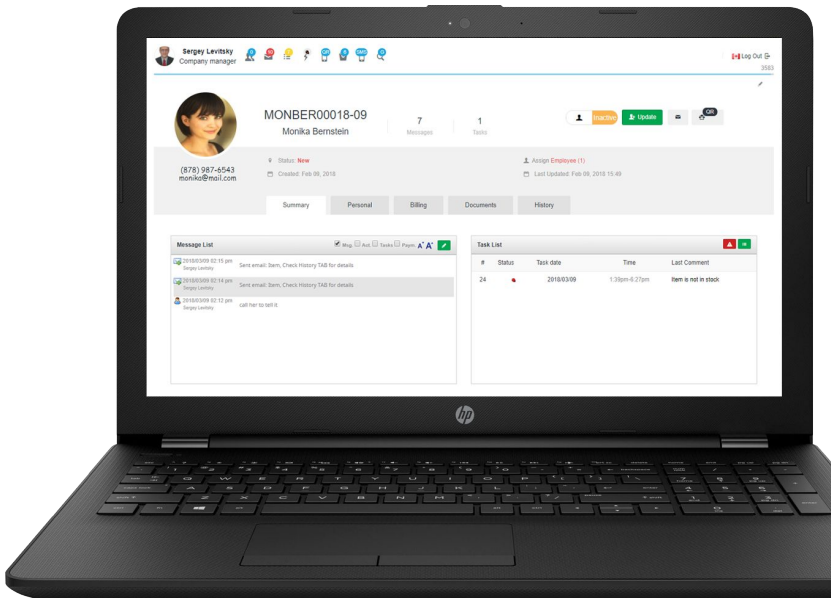# Customer Management

Customer management is a business process in which client relationships, customer loyalty and brand value are built through marketing strategies and activities. E-CRM allows any businesses to develop long-term relationships with established and new customers while helping streamline corporate performance. Our E-CRM incorporates a lot of functionality to communicate with customers, such as customer email verification, tracking email status (opened-not opened), tracking links in email body, Sending SMS, sending documents to customer by SMS, email or Fax, using advance secure technology and much more..

View demo →

- Leads support
- Export and import customers and leads
- Duplicate protection. Inform employee about the similar customer in the system.
- Advance customer search
- Use webcam or drag & drop uploader to add customer photo to profile
- Real time email verification. Employee can check email address (exist or not) in one click.
- Build-IN SMS, Fax, email, Click2Call function, record calls help communicate with the customer.
- Customer documents management with document tree, drag and drop files between folders, converting to PDF, shared folder and files, preview documents and more..
- Sending the documents to customer for review or/and E-Signature, using advance secure technology
- Creating document templates with active values, filling out a template using customer information.
- Shared customer documents between employee
- Notes tree. Add notes about customer
- History of customer activity. View incoming & outgoing email, View customer statuses history, updating profile, orders and invoices, assign to this customer.
- Print customer label with QR code
- Assign multiple employee to customer
- Assign services to customer
- Set current status for customer
- Generate order and invoice based of services
- Send emails to customer using templates
- Fully customization of customer profile

E-CRM customer management:

- Message list. History of all activity with current customer. Sorting and searching by type and priority.
- Task list. Set/update tasks assign to current customers.. View Task today & tasks history.
- Warning messages. Add very important notes about this customer. The employee must confirm warning before starting work with this customer.
- E-CRM use special formatting mask to easy entering information.
- Customer address verified by Google data base.
- You can view map and street view for customer information identification..

Contact with us for free DEMO and TRIAL