

BizSense CRM And ERP

Binary Vibes Information Technologies Pvt. Ltd.

<http://binaryvibes.co.in>

What is BizSense?

- CRM
- ERP
- Especially suited for small and medium businesses
- Custom enterprise CRM requirement can be addressed
- Open source and commercial versions available

Overview

- Sales force automation
- Marketing tools
- Invoicing and financial accounts
- Customer service
- Collaboration
- Reports
- Web services
- Administration

Sales Force Automation

- Contact management
 - Contacts and accounts
- Supports B2B and B2C
- Lead management
- Sales opportunities
- Quote
- Graphical reports

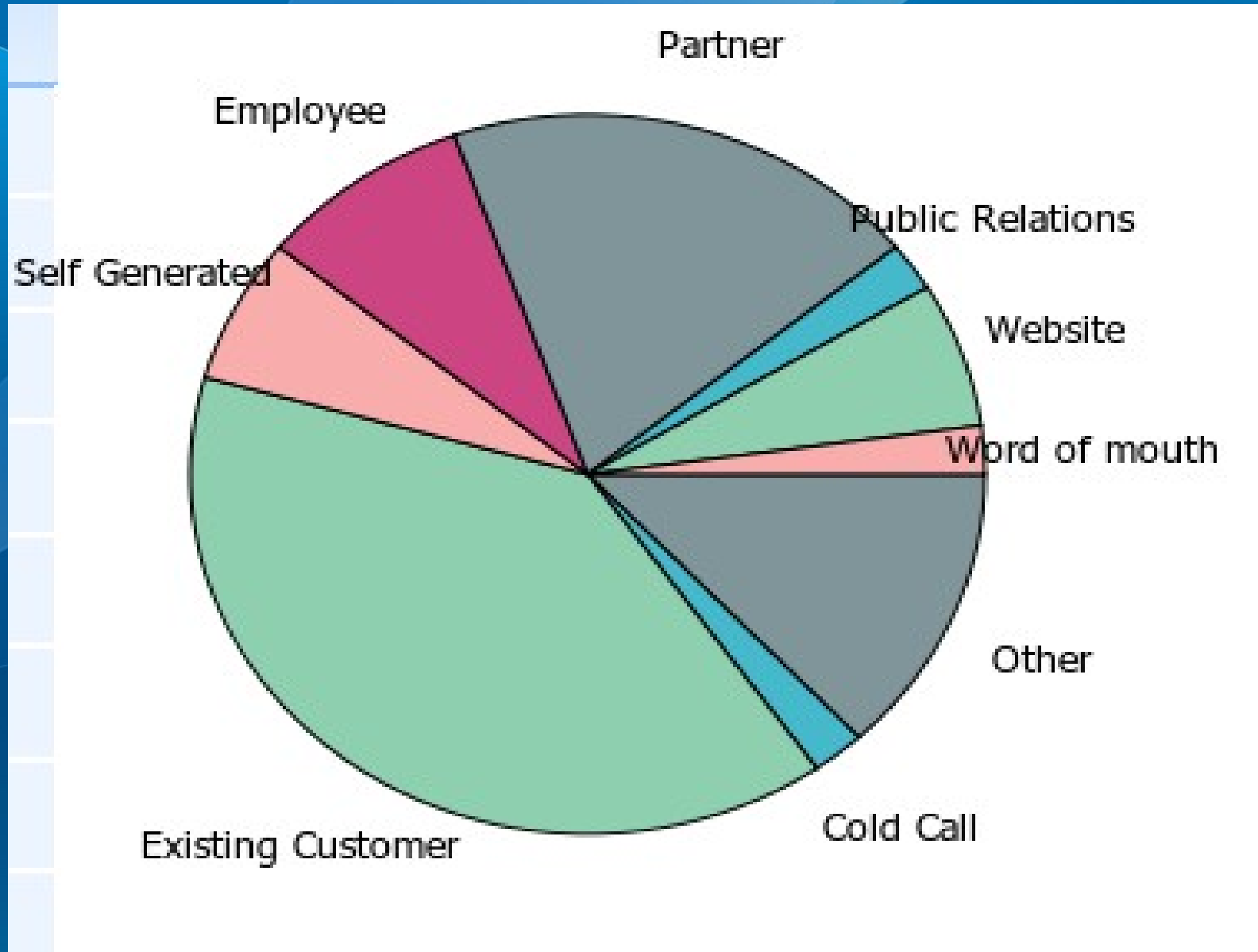
Leads

- Capture all leads
- Capture leads from website contact form
- Convert leads to opportunity, contact and account
- Leads available in home page dashlet
- Determine where your leads come from
- Determine how many leads get converted to business

Opportunities

- Sales opportunity
- Sales funnel
- Opportunities available in home page dashlet
- Determine your opportunity sources
- Determine how many opportunities are won or lost per user, branch, contact, account, etc

Sample Graphical Report



Quote

- Sales executives spend a lot of time preparing quotes
- BizSense can generate PDF documents for you
- Do you know how many quotes were accepted by your customers?
- Reports

Powerful Newsletter System

- One way mailing lists
- Helps you build and manage opt-in lists
- WYWIWYG editor to compose messages in HTML format
- Handles all the nuances of 'sending guidelines' of popular email service providers
- Handles bounce messages automatically using VERP
- Very effective when coupled with Binary Vibes Blix Email Server

Tips For Effectively Using The Newsletter System

- Build an own opt-in list
- Do not send newsletters to customers and prospects unless they are opted in
- Utilize the newsletter settings properly. When in doubt ask an expert
- Enable DKIM on your email server
- Enable VERP on your email server
- Listen to and act on user complaints

Customer Control Panel Options

- Commercial version available from Binary Vibes
- Roll your own using the BizSense REST API
- Web ticketing
- Marketing preferences

Collaboration

- Calls
- Tasks
- Meetings
- Information available in central location
- Get email, pop-up and SMS reminders

Financial Accounts

- Invoice – products and services
- Receipt
- Sales return
- Purchase and purchase return
- Payment
- Payroll
- Tax management
- Bank Accounts
- Cash Accounts

Financial Accounts Continued

- Bank account reconciliation
- Automated ledger posting
- Support for editing and deleting invoices, sales return entries, purchases, purchase return entries, receipts and payments
- Ability to configure ledger postings
- Branch office support
- Reports

Finance Reports

- Trial Balance
- Day Book
- Group Wise Summary
- Ledger Wise Summary
- Sales Register
- Purchase Register
- Outstanding
- Opening Balance Summary
- HTML, CSV and PDF format

Administration Area

- Settings
- SMTP settings
- Logo and footer
- Products
- Users and permissions
- Status
- Cron
- More

Web Services

- RESTful web services
- Leads, contacts
- Ticketing
- Newsletter

Deployment

- GPL V3 and commercial
- Support contracts available
- Hosted services available
- Custom development services available
- Community support in forums and IRC, #bizsense on freenode
- Recommended platform - Linux

What's included in support contract?

- Installation
- Backup and recovery
- Priority bug fixing
- Web ticketing
- Access to knowledge base
- Phone support
- End user and administrator documentation

Resources

- <http://binaryvibes.co.in>
- <http://projects.binaryvibes.co.in>
- <http://blog.binaryvibes.co.in>
- <http://techchorus.net>

Thank You

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