



BUSINESS SOFTWARE DEFINED



Zeta CRM is the award-winning software suite which addresses the business process needs of fast growing organizations across Sales and Support. Zeta CRM assists individuals and teams by centralizing contact and calendar information, increasing communication effectiveness and improving individual and team productivity.

### Major Modules

- Contact Management.
- Sales Management.
- Support Management.

### Contact Management

Zeta Contact Manger is designed to meet the needs of companies for centralized contact and customer information. It provide a single central repository for critical contact information captured across the organization, which reduces redundancy and errors, enable improved data control and security, and eases data maintenance tasks. Through Zeta Contact Manger the sales team can access contact details, know the relationship history, opportunities, information, so they can have knowledge communications with prospects and customers. The sales team can schedule calls and meetings easily. It can record communication with the contacts and track customer history of all communications.

### Sales Management

Revenue from sales is the live blood for commercial organizations. By using Zeta Sales Manager the company can enter the leads, access the leads and convert them to opportunities, view all sales opportunities at once or filter by using Sales stages, Status, Amount, Probability of close. It can also create quotes and orders for the leads.

### Sales Modules

- Pre-defined fields for contact details, e-mails and phone numbers.
- Ability to add extra fields.
- Note, activity and document tracking.
- Duplicate checking.
- Opportunity note, history, activity and document tracking.
- Product and service tracking.
- Built-in sales stages.
- Opportunity date fields.
- Opportunity designations as open, closed-won, closed-lost and inactive.
- Instant quotes.
- Filterable opportunity list view.
- Opportunity list export to Microsoft Excel®.
- Interactive activity, opportunity and dashboards.
- Interactive pipeline report with drill down capability.
- Export reports to Excel, HTML, PDF or e-mail.

### User permissions and access specifications:

- Password rules.
- Central search.
- Lookups on all fields.
- Advanced queries.
- Layout designer for editing layouts.
- Remove, edit or add fields.
- Customizable sales processes.
- Customizable opportunity field names and field types.
- Customizable reports.
- Excel import and export.

- Easy-to-use with a fresh look and feel.
- Interactive dashboard.
- End-user personalization of interface design and content.
- Impactful visual charts and highly graphical reports.
- Real-time synchronization between ZETA ERP.
- Dynamic linking of multiple information sources on a single dashboard screen.
- Pre-installed sales dashboard available out-of-the-box.
- Account contact and opportunity management.

## Support Management

CRM support module can improve customer satisfaction and productivity by automating customer support processes. It can assign ticket to the appropriate resource, record the status, urgency and nature of the issue and track time to resolution. View ticket assignment, priority weighting and notification request are available. It can also be linked to online supporting system.

### Support Modules

#### Administrator Settings:

- Create Customer.
- Create Consultant.
- Create Product.
- Create Department.
- Create Section.
- Create Ticket Type.
- Create Ticket Topic.
- Create Consultation Type.

#### Transaction:

- Create New Ticket.
- Cancel Ticket.
- Assign Ticket.
- Re-assign Ticket.
- Complete Ticket.
- Close Ticket.

#### Enquiries:

- Ticket Status Enquiries.

#### Reports:

- Client-wise Ticket Report.
- Consultant-wise Ticket Report.
- Department-wise Ticket Report.
- Section-wise Ticket Report.
- Ticket Type-wise Ticket Report.
- Topic-wise Ticket Report.
- Consultation Type-wise Ticket Report.
- Ticket Status-wise Ticket Report.
- Monthly Ticket Report.

#### Customer Functions:

- Update Profile.
- Create New Ticket.
- Send Reminder.
- Enter the Feedback.
- Ticket Status Enquiry.

**Consultant Functions:**

- Complete the Ticket.
- Ticket Status Enquiry.
- Individual Ticket Report.
- Assigned Ticket Report.
- Completed Ticket Report.



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