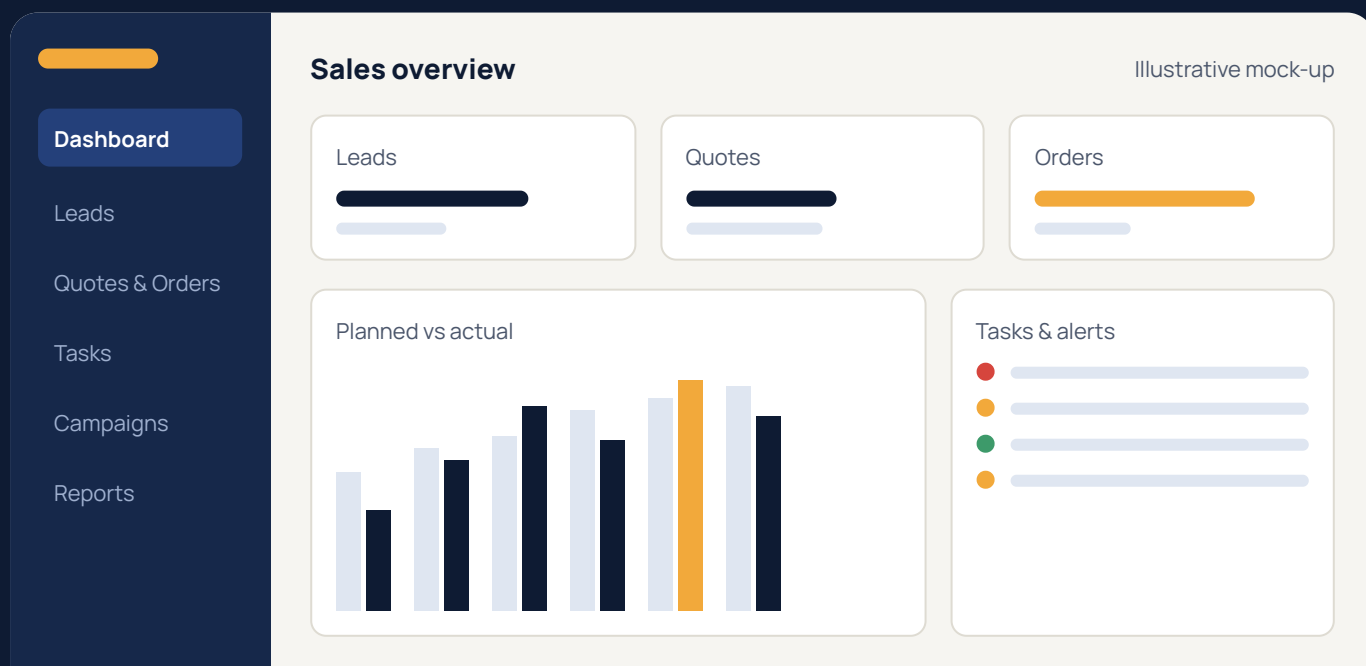


PRODUCT BROCHURE

Bigsun CRM Software

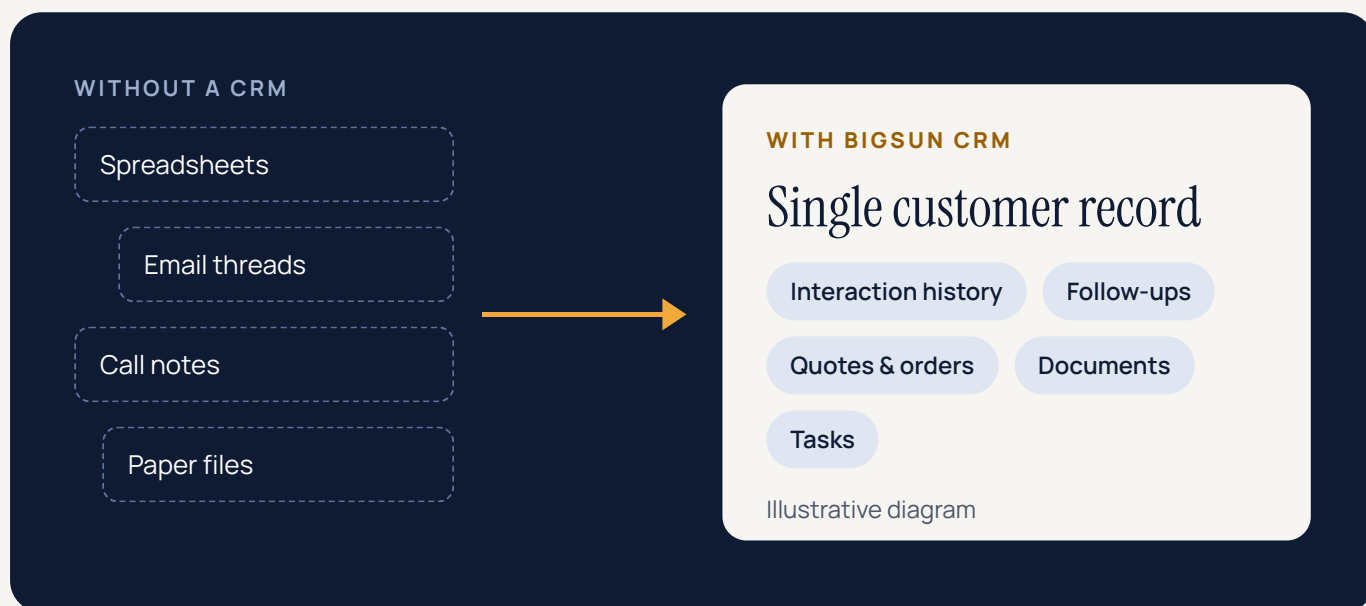
Turn Customer Relationships into Business Growth

A ready-to-use, web-based CRM that manages marketing, calls, visits, proposals, orders, expenses, tasks and activities for customer acquisition, with a single screen to track activity across all locations.



One place for every customer conversation

A CRM brings customer information, sales activities and follow-ups into a structured system, so teams work from the same record and managers can see what is happening.



Centralised customer information

A snapshot of each customer, with interaction history and transaction history alongside.

Reliable follow-ups

Reminders and colour-coded alerts keep tasks and appointments from slipping.

Organised sales activities

Calls, visits, proposals and orders are tracked as activities, not scattered notes.

Better business visibility

Planned versus actual reporting and flexible custom reports across locations.

01

PROCESS STAGE

Lead-to-Opportunity

The process begins with sales planning and ends with generation of leads. Structured planning, task assignments and campaign tracking turn prospects into qualified opportunities, with timely follow-ups.

01

Planning & Targets

Build sales plans with ease and set targets.

02

Personal Information Manager

Keep contact and customer details organised.

03

Document Management

Integrated document management, included.

04

Appointment & Tasks

Schedule appointments, assign accounts and tasks, set reminders.

05

Target Group Management

Organise prospects into target groups.

06

Campaign Management

Run campaigns and track them through to leads.

OUTPUT

Qualified leads,
ready for the next
stage

Prospect-to-Customer

The process begins with prospect planning and ends at customer acquisition. Quotes, dynamic pricing and order capture sit in one unified system.

01 Lead Tracking

Follow every lead and prospect, with real-time call tracking.

02 Quote & order capture

Capture quotes and orders in a unified system.

03 Dynamic Pricing

Pricing that adjusts to conditions and location.

04 Product Catalogue

A product catalogue with packaging management.

05 Alerts Manager

Alerts with colour codes and reminders.

06 Claims Management

Record and manage customer claims.

Dynamic pricing configurator

Adjust prices based on conditions, with location-wise pricing and product packaging management, and an integrated shopping cart so customers can place orders themselves.

03

PROCESS STAGE

Order-to-Cash

The process begins with order management and ends with continuous support. Collaboration, delivery fulfilment, billing and collections are managed across the full order lifecycle.



01

Order Management

Manage orders from placement onward. Customers can place orders themselves.

02

Collaboration

Teams coordinate through approvals, announcements and automated emails.

03

Delivery Fulfilment

Follow orders through delivery fulfilment.

04

Billing & Collections

Billing with dynamic ageing analysis and transaction history.

05

Knowledge Management

Shared knowledge and documents for the team.

06

Customer Help Desk

Continuous customer support after the sale.

— From order processing to customer support, on one connected record.

Everything the sales cycle needs

S

Sales and customer management

Snapshot of your customer, real-time call tracking, lead tracking and transaction history.

O

Orders and pricing

Quote and order capture, dynamic pricing configurator, product catalogue, packaging, customers can place orders.

R

Reporting and analytics

Planned v/s actual reporting, flexible custom reports, dynamic ageing analysis, customisable inventory reporting.

H

Customer support

Customer help desk, claims management, knowledge management, and a way to address burning issues.

P

Planning and campaign management

Build plans, set targets, manage target groups and campaigns, loyalty programs, announcements and newsletters.

A

Alerts and task management

Alerts with colour codes, reminders, appointments, assigned accounts and tasks.

C

Approvals and collaboration

Role and amount based, multi-level approval, document management, email and SMS integration APIs.

L

Access control and reach

Role rights with edit and approve options, multi-company, multi-location, anytime, anywhere access.

Practical benefits for sales teams and managers

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- | | | |
|----|---------------------------------------|--|
| 01 | Organised customer information | Customer details, interaction history and documents are kept together, so anyone on the team can pick up a conversation. |
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| 02 | Tracked sales activity | Calls, visits, proposals and orders are recorded against each customer and compared with plans and targets. |
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| 03 | Managed follow-ups | Reminders, assigned tasks and colour-coded alerts make pending actions visible. |
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| 04 | Coordinated teams | Approvals, announcements, automated emails and shared documents connect sales, operations and support. |
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| 05 | Improved reporting visibility | Custom reports, planned v/s actual analysis and a single screen across locations support better decisions. |
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Platform

Web-based, built on Microsoft SQL database, the Microsoft .NET framework and the IIS server. Available off the shelf or as a service, with anytime, anywhere access and email and SMS integration APIs.

Let's Transform the Way You Manage Customer Relationships

Discover how Bigsun CRM can help your team organise customer interactions, sales activities and order workflows.

Request a CRM Demo →

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