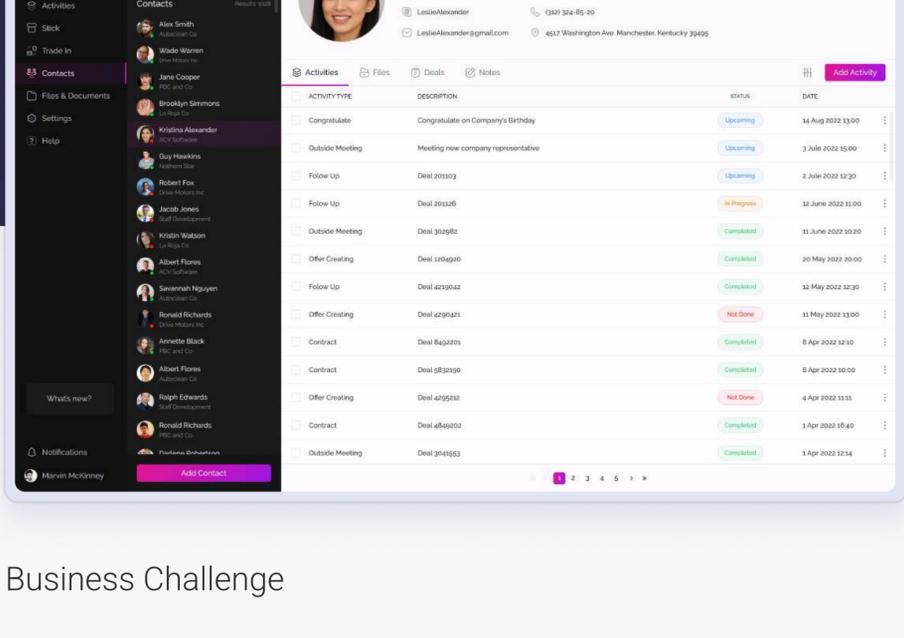


Handy Custom CRM Software

A full-featured online CRM system for successful customer management. This online CRM system is based on Webix, and it organizes all customer data (contacts, phone calls, correspondence, purchases) in one place.



Business Challenge

Dealing with customer data is difficult due to the enormous amount of information involved. Each new client generates a vast number of records that you must track continuously. Contact information, lists of purchases, correspondence, and other data must be easily accessible online to guarantee the best work outcome.

Our [ERP software development](#) team was asked to build an easy-to-use online customer relationship management (CRM) system that would allow access to customer-related info and improve interaction between the company and its clients. The customer required their online CRM software to have these features:

- handle activities and info related to core customers in a structured database;
- track sales managers' activities;
- enhance collaboration between teams both on and off site;
- provide managers with up-to-date information about car status;
- statistics aggregation and reports on deals, their stages, and timeline of each stage.

Solution

XB Software developers have built a comprehensive [online CRM system](#) that provides **easy access to all customer-related data**. The system allows the creation and management of car profiles with a single mouse click. Ability to add car statuses ('new', 'in progress', 'on hold', 'sold', etc), and 'attach a car to a deal' feature was implemented too. The system has three user roles: admin, C-level managers, managers (employees/CRM users).

Admins can use **built-in templates** to create activity lists for a particular manager that help them to monitor deadlines efficiently. All activities contain detailed info, such as customer contacts, for example. To improve collaboration between team members, our developers added mechanisms for **sharing workspaces** between different employees to this online CRM system. The app is **easily customizable**, which allows users to adapt it to the features of a particular company. For instance, activity types and statuses can be customized. A number of statistics, as well as activity and data reports, were developed with the help of [HighCharts](#).

Drag-and-drop support allows users to create and rearrange activities with ease. Also, you can close a particular task with a single click. **Cross-browser support** along with touch-friendly and responsive design makes this custom CRM system usable on any device. The Excel import and export feature makes sharing info between multiple employees and creating presentations easy.

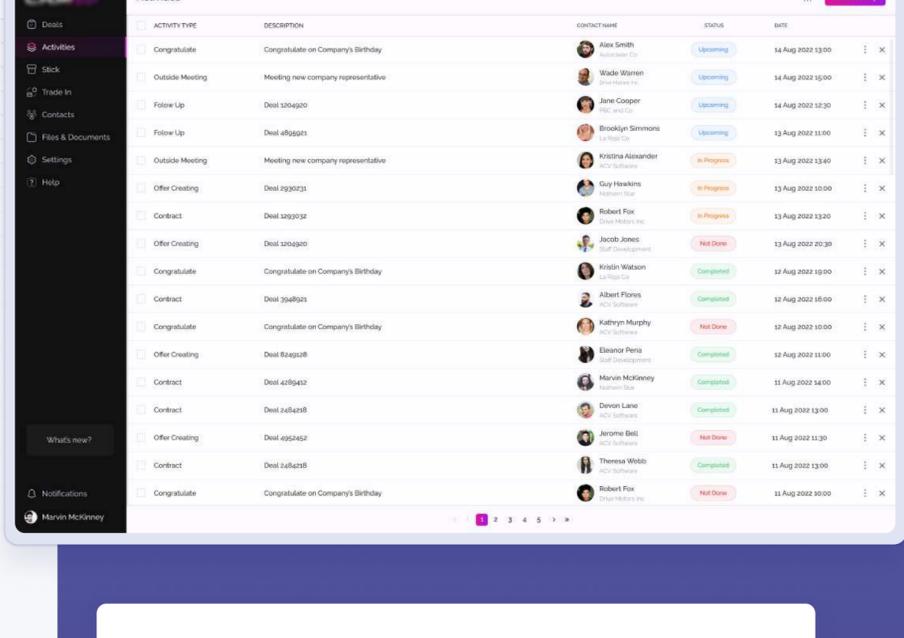
Moreover, this custom CRM system was developed as a [SaaS solution](#) that was adapted and customized according to the customer's needs.

Implemented Components

During the implementation of all features requested by the customer, we used our own product, known as [Webix](#). It significantly increased development speed, and its features offer flexible options that can be implemented in any solution.

To let users work with the system easily and faster, we added the [User Manager](#). With the ready-made admin panel and other settings implemented in the widget, it became easier to manage the users list and administer access rights and permissions. [Document Manager](#) is another feature that was added in the CRM software to have quick access to the invoices, commercial offers, and different important documents and files shared by employees or clients.

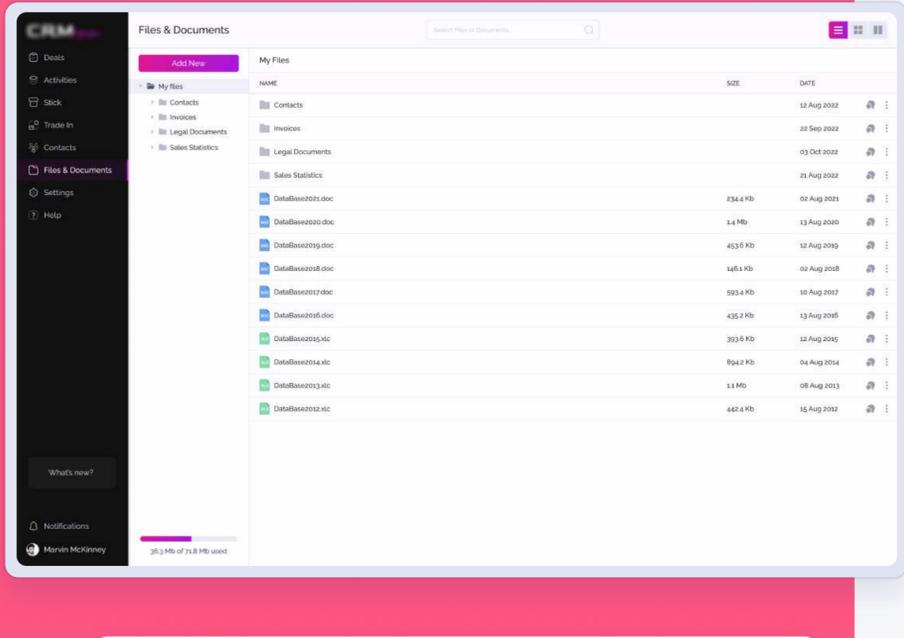
As a result, the system is organized and has a user-friendly, neat, and responsive user interface.



Project in Figures

7+
Months
Duration

1500+
Estimated
man-hours



Applied Technologies

Result

The broad experience in [custom web application development](#) allowed XB Software developers to create a comprehensive online CRM system, which allows users to significantly increase customer satisfaction and work performance. The online CRM system provides easy access to all customer-related data and allows efficient tracking of all current activities.

The CRM software we built allows managers to:

- ✓ improve interaction with customers and increase their loyalty
- ✓ increase team members' collaboration and enhance their effectiveness
- ✓ create and handle activity lists with just a click to stay ahead of deadlines and improve the task tracking process

Your questions and requests are always welcome!