

TOTALCRM



Total Customer Relationship Management Platform

Total CRM is a complete helpdesk and customer relationship management platform that allows for single operator businesses and teams to organise and manage contacts, clients, email support tickets, tasks, live chat support services, user monitoring and more from an intuitive back office management platform.

Total Customer Relationship Management Platform

We provide our customers with 24/7 email and live chat support to help you efficiently manage your business.

The Total CRM Platform

The Total CRM Platform is a complete helpdesk and customer relationship management platform that allows for Small business operators and large teams to organise and manage contacts, clients, email support tickets, tasks, live chat support services and user monitoring from an intuitive back office. View and manage your website traffic in real time, provide live chat support and manage all contact and client communications. Report on all your support channels to enable you to optimise and manage your sales and support operations from an intuitive back office platform.

Company, Contact and Client Management

Login to your Total CRM back office to Add a new prospect to your contact database. With the ability to create multiple groups, tag your prospect to one of your created groups to enable targeted email communication to them. Create unlimited contacts and attach them to the prospect company and even provide them with access to the Total CRM support ticket portal to manage any support tickets in future. You can edit any prospect company or contact information from your back office, sort your data through multiple easy filters and when your prospect becomes a client, move the prospect to your client dataset. A detailed overview of your client data, you can manage your client list from your Total CRM back office and view all internal notes. Communicate with your prospect and client contacts through an integrated web based mailing system that enables you to target your product group and contact level groups.

Task Management, Sprint Planning and Shared Calendar

Create and manage unlimited sales, support or technical tasks. Move tasks to your Sprint Planner assigning them to any members of your team. Monitor each tasks progress and status whilst tracking resource timing and any paid support costs.

External and Internal Support Ticket Management

Enable any client to access your support channels through your own branded support center. Clients that you have provided access, can login to your support center to create support tickets and view all current and archived ticket threads. Additionally your approved clients can send email to a specified support email address and the message will be automatically converted to a support ticket with your clients being able to view all responses via email and the online support center. Support tickets can be assigned to any of your admin user accounts, with all threads available for the client and the admin users to view at any time. Open new client and inhouse support tickets, respond to tickets and close tickets from your back office.

Live Chat Management and Visitor Reporting

Deploy a simple snippet of html code to your pages to provide your visitors with a full featured live chat service. Monitor your visitors from an intuitive live chat dashboard, view your chat history and offline messages and set a variety of triggers for specified urls to notify you via key sounds. Use an alternative snippet of html code to simply monitor your visitors onsite activity in real time.

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Snapshot Dashboard, Task Board and Communication Center

The snapshot dashboard displays reports for all your CRM activity with information on users, companies, tasks and more. Latest scheduled events from the shared calendar are displayed alongside any custom news any admin with permission can publish to all admin users. Your task board displays all your support tickets and tasks laid out to show you the status of each for easy management and reporting. Send email messages to your internal users or target your contacts. Personalise your messages utilizing embedded macros and attach files.

Integrated Paid Support Rate Management & Performance Reports

If your business charges support rates to its clients, Total CRM has the ability to track and report all paid support tasks for each client. Monitor your free and paid support activity and report on hours and fees charged. Total CRM provides you with the ability to create multiple different support types with unlimited rate variables. A detailed report section provides you with the ability to breakdown and filter your reports on your Clients, CRM activity, Ticket, Tasks and Notes. Reports can be shown in charts for easy understanding and even show you peak support and client activity times enabling you to efficiently manage your business.

Links & Settings

Bookmark any system, general, ads and external links from your back office and monitor that all are working correctly at all times. System settings are available to approved users where you can manage all back office features and functions.

Additional Features and Upgrades

We continually develop new features and upgrade our technology to ensure that you are utilising a world class product and service. All new features are added to all existing clients platforms as soon as they are released. As standard, we try to push new major feature releases at least two times per year. We provide full training on all new features via skype for all clients.

For more information on all the Total CRM platform, please visit www.total-crm.com

Market Leading Platform Features

Our CRM platform has been designed and developed by a team of business management specialists and award winning system designers to provide our clients and business partners with a new generation of CRM platform that enables you to build, manage and grow your business from an intuitive easy to use cloud hosted back office.

Platform Features

- ✓ New Lead Management
- ✓ Company Management
- ✓ Contact Management
- ✓ Client Management
- ✓ Task Management
- ✓ Sprint Planning
- ✓ Sprint Management
- ✓ Shared Calendar
- ✓ User News Publishing
- ✓ Support Ticket Management
- ✓ Live Chat Service Management
- ✓ Live Site Visitor Reporting
- ✓ Snap Shot Dashboard
- ✓ Task Board Organiser
- ✓ Email Communication Center
- ✓ Integrated Paid Support Rate Management
- ✓ Performance Reports
- ✓ Role Based User Access

Affordable Business Management Platform

Forget the over engineered platforms that charge you for features that you will never use and make managing your business communications a simple and efficient experience.

Pricing

Total CRM offers a simple setup and monthly license to all new clients. All Total CRM systems include full setup with your branding and colour scheme, mirrored platform and database hosting, 24/7 support and lifetime upgrades for all new features. We offer three license options depending on the size of your business and your requirements.

	Single User	Professional	Enterprise
Max User Accounts	1	5	Unlimited
Setup Fee	195.00	195.00	195.00
Monthly Fee	50	150	450
Custom Branding Colour Scheme & Brand Logo	N/A	Included	Included
Company, Contact and Client Management	Included	Included	Included
Task Management, Sprint Planning and Shared Calendar	Included	Included	Included
External and Internal Support Ticket Management	Included	Included	Included
Live Chat Management and Visitor Reporting	Included	Included	Included
Snapshot Dashboard, Task Board and Communication Center	Included	Included	Included
Integrated Paid Support Rate Management	Included	Included	Included
Performance Reports	Included	Included	Included
Free New Feature Module Upgrades	Included	Included	Included
Mirrored Platform & Data Backup	Included	Included	Included
Unlimited Product Categories	Included	Included	Included
Dedicated Setup Management	Included	Included	Included
Full Platform Training and Support	Included	Included	Included
Full Service Level Agreement	Included	Included	Included
Platform & Database Hosting (GBPM)	10.00	10.00	10.00

Contact

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