



OFFICE TRACK MANAGER

Manage your office Smartly

NEW
WAYS OF
BUSINESS
GROWTH





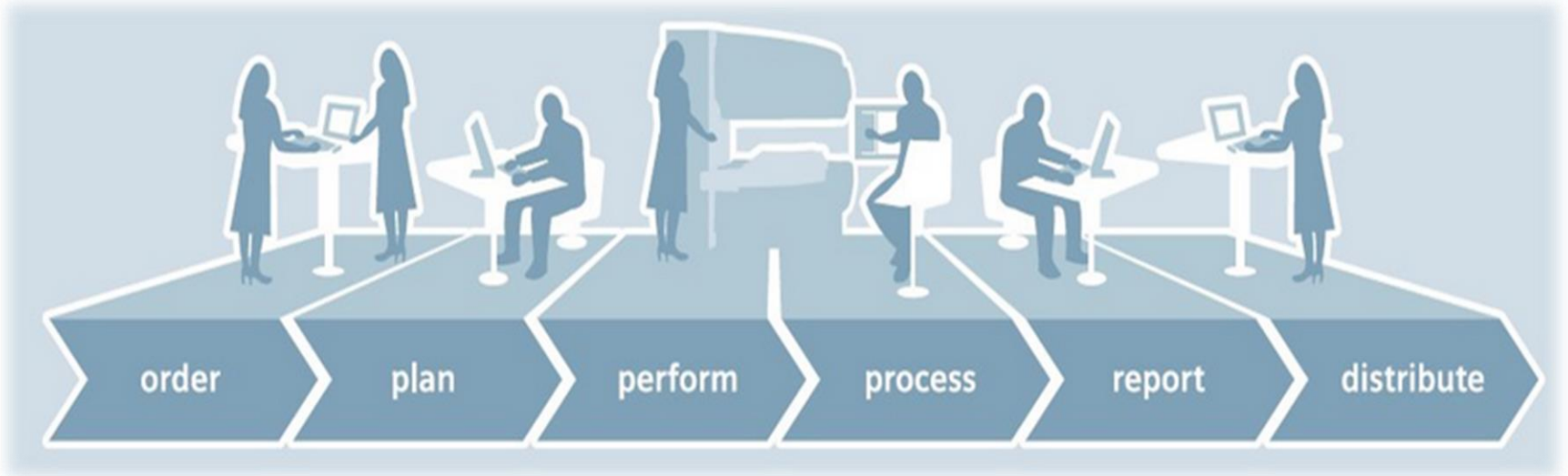
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INTRODUCTION



- Office Track Manager(OTM) is all about managing your Office in a smarter manner from anywhere around the world even when you are on the go. OTM integrates technology, business processes & people to achieve the primary goal: 'Keeping its customers Happy'.
- Customize your business workflow around your client's entire lifecycle. Capture leads, collaborate on projects, and bill your clients.
- Attach documents to leads, contacts, projects, invoices, expenses, events, support cases, and other activities.
- flexible and unlimited contact structure allows you to capture your relationships with companies and individuals – and their relationships with each other.
- Collect & manage leads, collaborate with clients & team members on projects, bill clients.
- Track all finances related to your project, monitor progress, run reports, and view all unbilled charges.





ERP & CRM



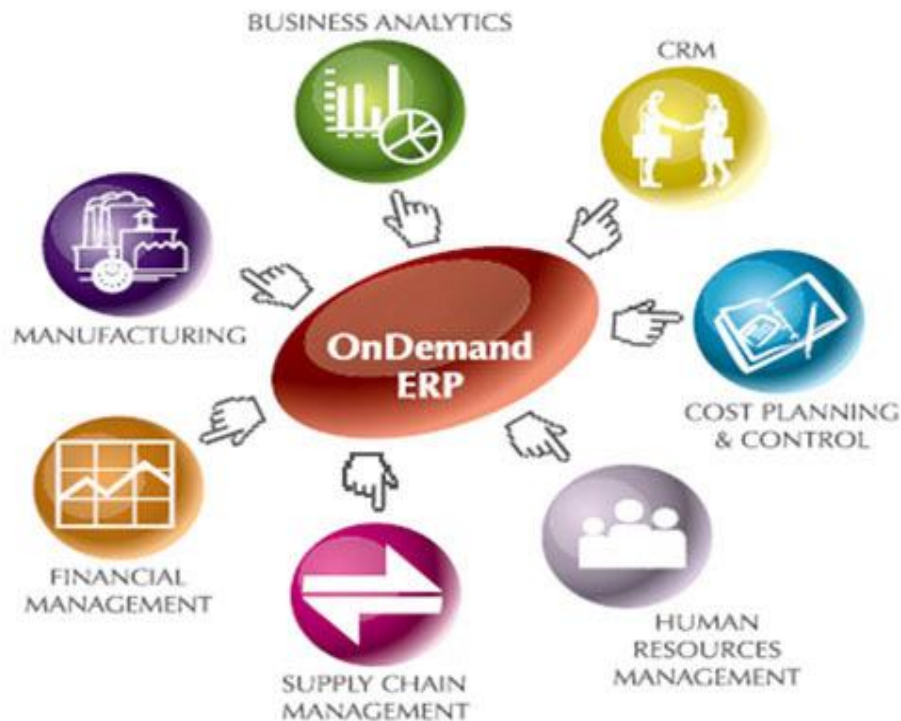
- ERP is a software-based business solution that relies on data collection and analysis for effective and efficient resource management.
- CRM is business strategy built around the goal of building and maintaining stronger relationships with key customer groups.

ERP and CRM Integration

- ERP is often directly integrated into CRM because of their similarities with regard to data collection and analysis. Broad software applications can cover both programs' needs. ERP uses data for improved operational efficiencies, while CRM works to increase revenue.



WHY ERP/CRM?



- Fully integrated ERP-CRM systems are having significant impact in the manufacturing area.
- Manufacturers may not have the robust new customer needs of retail or distribution companies, they still have a huge need to build deep relationships with their existing customers.
- ERP-CRM can bring the insights to knowing exactly what is happening to each and every customer and to building processes to maximizing those relationships.
- ERP-CRM can be the center point of communications that keeps your people acting as a team to the customer.
- ERP-CRM can also take your sales process to new levels of performance and responsiveness. A visible, structured process provides a roadmap to performance that allows continuous trial and improvement.





ERP vs. CRM

ERP

- ERP software is designed to make a company's processes more effective and efficient.
- Managing all of the key functions of a company – accounting, warehouse, inventory and supply chain – ERP software allows the company to focus
- With integrated ERP software, employees can update the platform with important information available in real-time to all departments
- ERP software will capture the issue and make it available to all areas affected, such as the warehouse. ERP not only provides all departments with updated information, but it also gives companies a clear and accurate picture of their standings at any given moment.

CRM

- CRM software fulfills the customer-side of the system. Customer relationship management systems (or CRM systems)
- This software manages customer information and captures all relevant details for the company.
- This information is used all across the board, from sales reps to managers to accounting personnel.
- A quality CRM system should capture *every* interaction the company has with the customer. By properly managing customer information, companies can build their customer relationships in order to increase customer loyalty and, ultimately, revenue.





OTM CORE VALUES

Concern for Excellence
Sense of Urgency
Honesty and Integrity
Quality through Continuous
Improvement
Transparency and Building Trust





WHY OTM?

- **Office Track Manager** integration is designed to help automate and integrate key processes across your business and support you in managing the entire customer acquisition process.
- By integrating **Office Track Manager** in your business processes, your staff can view and work with the same data. Time spent on re-entering and re-verifying data is saved and accuracy is improved, ensuring all departments have access to up-to-date data for a superior customer service experience





OTM PLANS

We offer 3 plans each of which offers different services-

- **OTM silver(INR 150000):** This is the basic plan which includes 5 services- Production, Purchase, Point of Sales, Inventory, Accounts, Data imports/exports.
- **OTM Gold(INR 200000) :** In addition to services offered in OTM silver plan, it also includes HR, Project Management, Mass Emails, Work Flow.
- **OTM Premium(INR 500000):** This is the premium plan. In addition to services offered in Gold Plan, it also includes services Finance ,3rd party API integration , CRM, Multi Module Tools ,User Support(per module).

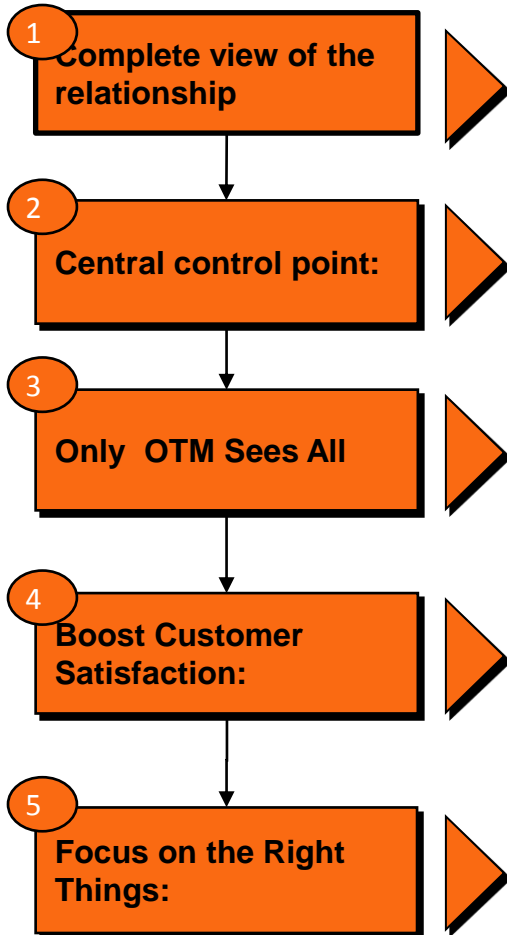
Note –

- More details about the plan and plan comparison can be found out at www.crispsoftware.in
- INR – Indian Rupees





BENEFITS OF OTM



1. Complete view of the relationship :

- ▶ OTM provides a full view of all your activities with each customer.
- ▶ In an instant, you can determine where problems are occurring, and take action

2. Central control point:

- ▶ OTM provides an excellent way to centralize all the transactions that involve the prospect or customer.
- ▶ This macro and micro view of the marketing and sales process provides management the ability to view and make the necessary changes for improvement.

3. Only OTM Sees All:

- ▶ Manufacturers need to be aware that CRM solutions come in two flavors- standalone, and integrated.
- ▶ Integrated OTM solutions provide the same results, except that they integrate information from the rest of the ERP system.

4 Boost Customer Satisfaction:

- ▶ Another feature of a high level OTM is the inclusion of call center, and service satisfaction functions.
- ▶ Unanswered calls are also escalated to management as one more method to assuring customer satisfaction.

5. Focus on the Right Things:

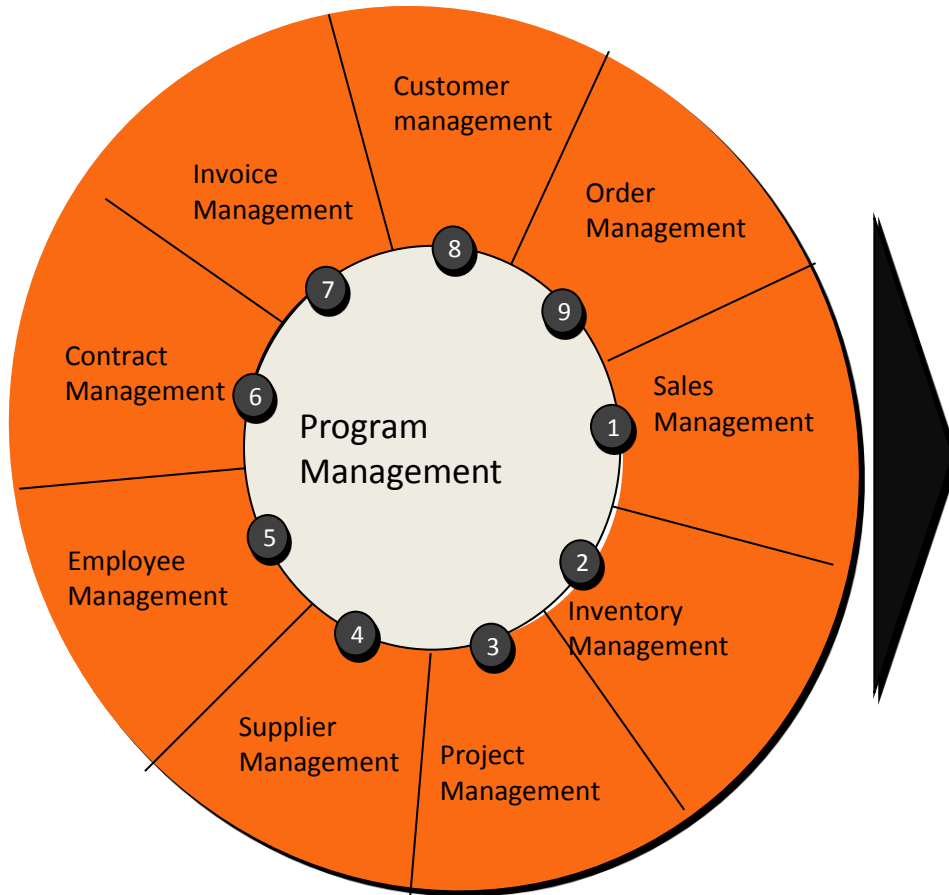
- ▶ OTM provides both the structure and the insights to aiming at the right targets.
- ▶ OTM centralizes the information about each prospect, and affords you the insight into discovering which accounts have the most potential.





OTM FEATURES

Striving for Excellence and Success



OTM(ERP/CRM) Features

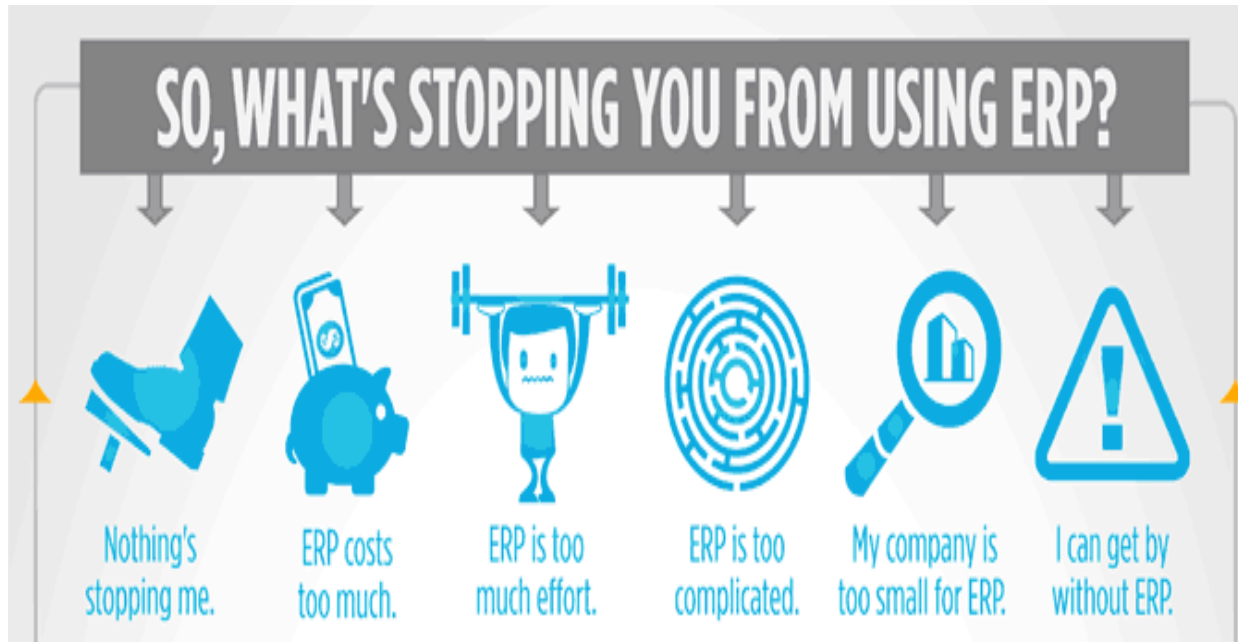
CRM Features

- Lead, Opportunity and Pipeline management.
- Incident, Project, and Activity tracking
- Customer, Order and Invoice integration
- Document storing and linking
- Mail-Merge, e-Mail Blasts, Campaign Management
- Contact, Calendar Appointment and Task Management integrated with Outlook
- Customize fields, terminology to match your business
- Efficiency, Productivity, and Customer Satisfaction are important benefits to be obtained from a robust CRM application.

ERP Features

- ERP solution designed for optimum usability, organization can achieve.
- Reduce Training and Implementation Timeframes to Improve ROI.
- Lower TCO.
- Improve Productivity.
- Improve Staffing Flexibility.
- Enhance Collaboration with Stakeholders.





Whether your small or medium business's goal is to save money, grow your organization, improve operations, make your customers happy — or all of the above — Enterprise Resource Planning software is your answer.

***Note – All modules available on cloud**

Free Online Demo

If you are interested to know more about OTM, please visit –

1 Office Track Manager Details officetrackmanager.com

2 Office Track Manager Unguided online demo ordertrackmanager.com



Thank You! Want to check out other services developed by Crisp?



Check them here -

<http://www.youtube.com/watch?v=ulWI7baWMXs&feature=relmfu>

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