# Navertica PowerCRM

## Streamline business processes and administration

With **Navertica PowerCRM**, you no longer have to run business administration in Excel. It is a solution that increases sales productivity and marketing campaign effectiveness based on insights from social media, business intelligence tools and campaign management.

### Main benefits

- Complete coverage of the business process, from initial contact to a sale.
- Consistent view of customer data and contact history
- Effective sales
- Access via web interface or mobile app
- Connectivity with Office, Teams, Power BI
- Analyses and reporting

### Main features

- Lead, contact, account and opportunity management
- Product catalogs
- Discount mechanisms
- Sales analysis
- Connection to DMS for storing business documents
- Marketing campaign management
- Bulk e-mailing
- Forecasting

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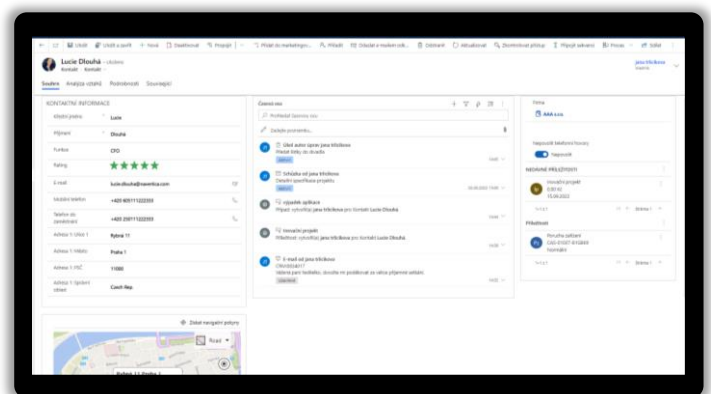
## Customer management

Have a **complete database** of contacts, leads and customers with all common data such as contact details, business information and address locations in one place. You can create contacts, business opportunities, addresses, shipping schedules, service incidents and more on the customer card. For existing and potential customers, keep a clear record of emails, calls, appointments, tasks or other activities. These can be recorded, and in the case of emails, also traced and synchronized with **Microsoft Outlook**.

## Sales

Cover the **entire sales process** from initial customer interest, through, opportunity identification to a sale. Within the opportunity, edit budgets, store quotes, draft contracts, set SLA mechanisms, etc. Within the opportunity, it is possible to create a structured offer from a product catalogue containing a complete list of delivered items, including prices and specifications. Simply insert the offer into a **document template with corporate graphics** and send it to the customer immediately. The email will then be registered including the customer's subsequent response.

## Mobility

You only need a web browser to use PowerCRM, so you can simply log in **from anywhere on any device**. To work from your phone or tablet, you can use the fully responsive app that allows you to upload images from your camera, record audio, scan business cards or start navigating to a client's address. **The app also works in offline mode**, and records are automatically synchronized when reconnected to the internet. It is also possible to integrate chat services such as WhatsApp or Viber into PowerCRM and thus keep complete communication in one place.

## Effectiveness

Thanks to **native integration** with Microsoft products, business document templates with custom graphics can be created from data. Key records in the solution can be published to a channel in Microsoft Teams, from where they can also be managed. Track an email, a meeting, a task, or create a business case from an email into PowerCRM **directly in Outlook**. This eliminates the need to copy and switch between applications. With a wide range of advanced filter options, you can create reports in a user-friendly way. Real-time data insights can be clearly visualized in dashboards and charts.

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## Modules extending the PowerCRM

### Sales Configurator

A **graphical configurator** that makes it easier for the sales representative to create offers. The user has the possibility to dynamically load data, for example, from the ERP system and perform various checks and calculations in the background during the creation of the quotation.

### Incident Management

Get sophisticated software to **manage support requirements** across their lifecycle. Key features include request recording, file storage, automatic request assignment, notification and evaluation.

### Conference Point

A system for **managing meetings** and negotiations, comprehensive reports according to the user's wishes, templating and registration of items that are consulted at several meetings in a row.

### Contract Management

Comprehensive **contract management**, workflow for contract reminders and approvals, and file storage in DMS.

### Project App

**Project management**, from preparation through execution to completion. Projects are executed based on a contract between the company and the customer.

### Modern platform Power Apps

Navertica PowerCRM is built on the modern cloud-based **Microsoft Power Apps** platform, which is the perfect modular environment in which it is possible to create and tailor an application to each customer's exact needs, connect to their data and work across multiple platforms.

### Connectivity and Extensibility

Navertica PowerCRM can be easily integrated with other Microsoft solutions. Examples include integrating **Microsoft SharePoint** shared libraries for file storage, tracking and logging emails from **Microsoft Outlook**, or creating reports in **Microsoft Power BI**. The solution can also be extended with modules for graphical configuration, project management, queue management or support and customer requirements management. These modules can be integrated into the PowerCRM solution but can also be purchased separately.

## Contact us, we are here for you!

We have been operating in the information technology market for more than 30 years and have helped to improve the economic performance of our customers not only in the Czech and Slovak Republics, but also in many European countries, South Africa and the USA. We are happy to help you with the optimization of business processes and business solutions in various branches such as production, trade, services, logistics, project management, and healthcare.

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