

1CRM INTRODUCTION

One system for all your business needs

The screenshot displays the 1CRM system interface on a tablet. The top navigation bar includes 'Today's Activities', 'Sales & Marketing', 'Order Management', 'Project Management', 'Customer Service', and 'Reports & Settings'. The main dashboard is divided into several sections:

- Home Dashboard:** Overview of the system.
- Calendar:** A monthly calendar for January 2018 with activity overlays. Key events include 'New Year's Day' (Jan 1), 'Martin Luther King, Jr. Day' (Jan 15), 'Explore sale of Replacement Windows' (Jan 24), 'Sales Meeting' (Jan 25), and 'Kickoff Meeting' (Jan 26).
- Opportunities Funnel Chart:** A funnel chart showing the pipeline total is \$5,145,00K. The chart is divided into stages: Prospecting (365), Qualification (480), Needs Analysis (455), Value Proposition (545), Id. Decision Makers (670), Perception Analysis (395), Proposal/Price Quote (500), Negotiation/Review (480), Awaiting Paperwork (690), and Closed Won.
- My Contacts:** A list of contacts with columns for Name and Office Phone. Contacts include Amber Alsop, Chasity Aranda, Brittney Bessey, Randal Botsford, and Brandie Boyster.
- My Quotes:** A table listing quotes with columns for Quote #, Shipping Account, Amount, Valid Until, and Stage.

Quote #	Shipping Account	Amount	Valid Until	Stage
2018-41	C Nelson Inc 2	\$ 1,249.38	2017-05-03	DELIVERED
2018-40	EEE Endowments LTD 2	\$ 1,695.00	2018-11-10	ON HOLD
2018-39	Gifted Holdings AG 2	\$ 3,168.54	2018-10-10	DRAFT
2018-38	JBC Banking Inc 2	\$ 4,682.24	2018-12-25	DRAFT
2018-37	MTM Investment Bank F S B 2	\$ 2,173.94	2018-01-10	DELIVERED
- My Calls:** A list of call logs with columns for Close, Subject, and Start Date. Entries include 'West Coast Conf Call' and 'Left a message'.
- My Inbox: Unread Emails:** A list of unread emails with columns for Subject, Contact, and Date. Emails include 'Introduce all players', 'Initial discussion', and 'Demo'.
- Macworld:** A section for news and updates, including articles about iOS 11.3, HomePod, and other tech news.

1CRM - THE COMPANY

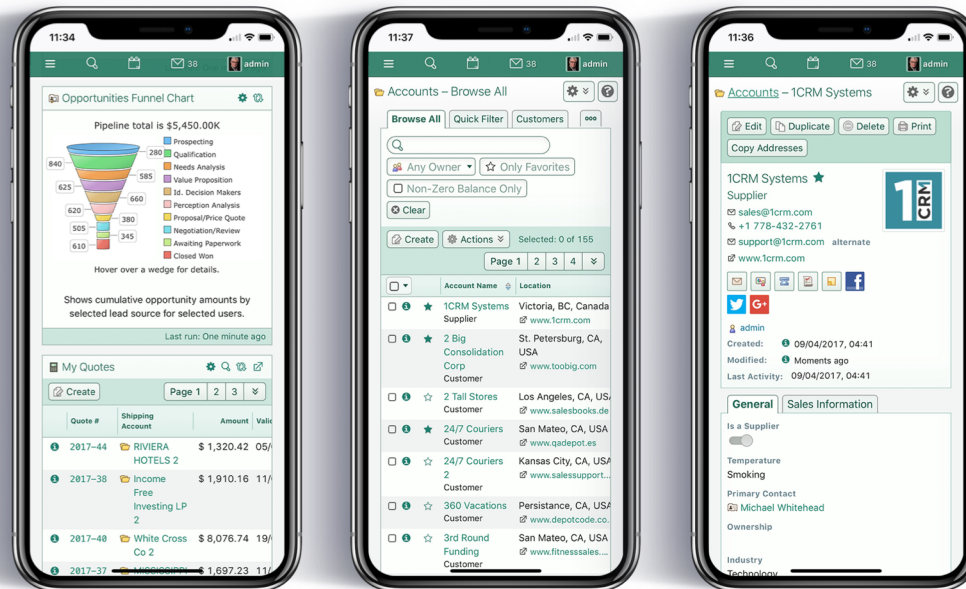
Founded: 1997

Ownership: Privately held Canadian company

Headquarters: Victoria, BC

Partners: Worldwide

1CRM is a highly customizable and cost effective Customer Relationship & Business Management system. It allows you to organize your whole business within a single web application, and access that information at any time. Available in the cloud or on-premise, you can make 1CRM your own.



WHAT 1CRM IS ALL ABOUT

1CRM Corp. is dedicated to transforming each customer's business into an efficient, cost-effective, well-oiled machine. We firmly believe that the only way to do this is to enable each client to create a solution as unique as their business.

- One that they can customize, bend, and adapt to really fit their business.
- One that can grow and evolve with their business.
- One with many integrations to work with the products and services they love, and save them time each day. Telephony, Accounting, Online Store, Website forms, Google Apps, Outlook, Apple and Android .. everything works with 1CRM.
- One with all the features they require to run their business effectively, from sales and marketing to order management, customer service, project management and general management.
- Lastly, one with an affordable price. Customer relationship management is more important now than ever, so 1CRM is a product every business can afford and use to manage their business and their customer relationships.

1CRM - THE PRODUCT

Available editions

Startup, Startup+, Professional, Enterprise

Deployment options

On-Premise & Cloud Subscriptions, On Premise Perpetual Licenses
Installs on Windows Server, Linux Server or Mac OS X.

Access options

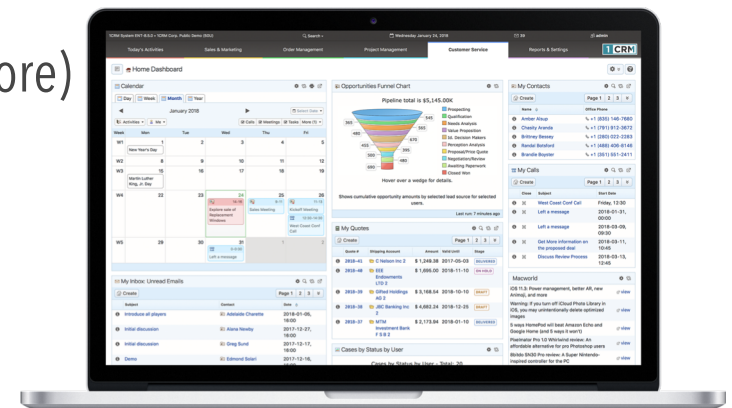
Via Chrome, Firefox, Safari, I.E./Edge Browser on Mac OS, Windows, iOS, Android

Languages supported

English, French, German, Italian, Spanish (open to adding more)

Intended users

Businesses with 1-200 employees



1CRM FEATURES

Key Features	Description
MARKETING AUTOMATION	Generate lead forms for your website and affiliates. Convert those leads into customers by creating newsletters, drip-feed campaigns and dynamic target lists. Track your results with generated graphs.
ORDER MANAGEMENT	Create custom quotes & invoices to match your branding, set up recurring invoices and track bills & payments. 1CRM supports multiple layouts and tax rates, group & line item discounts, quote approval workflow and more!
PROJECT MANAGEMENT	Manage and track projects throughout their lifecycle with 1CRM. Define project templates for common types of Projects, with lists of project tasks and assigned resources. Create and track booked hours, timesheets & expense reports within 1CRM.
MOBILE ACCESS	Access 1CRM from any Windows, Mac, iOS, Android or Windows Phone device. Compatible with Safari, Google Chrome, Microsoft Internet Explorer and Mozilla Firefox, 1CRM is available wherever you are.
CASE MANAGEMENT	Manage and track cases throughout their lifecycle. Track client interaction, book hours, service parts to service cases, and print work orders.

1CRM FEATURES

Key Features	Description
EMAIL	Compose and send emails in text or HTML format, and 1CRM will automatically attribute them to the contact or account they relate to.
CUSTOMIZATION	Choose from multiple languages, themes and colour schemes to personalize your 1CRM experience. Create custom dashboards, fields, workflows, layouts and modules to instantly access the data you need.
CONTACT MANAGEMENT	Manage all your contact, lead and account data from a single platform. Recorded contact details, emails, meeting notes can be searched easily, providing quick access to any interaction.
PORTAL & ESTORE	1CRM's free Joomla-based Self-Service Portal has forums, cases, bugs, projects, knowledge base, event registration, invoice/payment history, and an integrated eStore.
CALENDAR	Click and drag to create or re-schedule calls or meetings. Grid views show who is free for a group meeting, and the system can automatically send an email notification to selected participants.

1CRM INTEGRATIONS

Create the ultimate toolbox for your business – integrate 1CRM with all of the tools your team uses every day. Switching between apps is a tedious and time-consuming habit. Additionally, it leaves your business information scattered all over the place.

Work Smarter – Not Harder

Integrations save time and promote collaboration by providing access to every tool and every piece of information from a single platform. 1CRM helps you increase customer satisfaction while reducing support costs!

Want to create an integration but aren't sure how to customize 1CRM code yourself? We can introduce you to high quality inexpensive development partners – or the Developer Guide is on our site, with details on our REST API, system design, etc..



THE 1CRM DIFFERENCE

Cost effectiveness

1CRM includes more features for a lower price than most CRM solutions on the market. Monthly, annual, and perpetual licenses are available to suit the unique needs of more customers.

User minimums

Businesses can begin using 1CRM with as little as 1 user, while some competitors have minimums of 8-10. Large minimums exclude potential customers who need to test a CRM before enrolling their full workforce.

Full featured

Many "CRM solutions" are missing key features that businesses rely upon. They might only offer marketing automation, but market themselves as a CRM.

This forces users to seek out other programs to use in addition to their "CRM", while eating up their time and money. 1CRM goes above and beyond by including full order management & project management, in addition to standard CRM features such as sales & marketing automation, case management, email and calendar integration.

THE 1CRM DIFFERENCE

Customizable

With 1CRM, users can easily create custom dashboards, layouts, fields, and modules to suit the ever-changing needs of their business. Unlike many CRM vendors, 1CRM also provides users with the source code. This allows users to add more extensive customizations, without having to pay for expensive customization services from a restricted set of suppliers.

More than Cloud

While Cloud CRM is increasing in popularity, there are still many clients who prefer to keep data strictly on their own servers. Many CRM companies no longer offer this option. Available as a Cloud service or On-Premise software, 1CRM meets the needs of both types of clients.

Regardless of deployment option, you can also export your data from 1CRM at anytime via CSV - your data will never be held hostage! And run regular backups via SSH or FTP to any server you control, or use our easy DropBox backup feature.

DOING BUSINESS, BETTER.

Requirements	Questions
COST EFFECTIVENESS	Are you currently paying for more users than you require? Does your CRM or business software occupy a large portion of your budget?
INCLUDED FEATURES	Does your current software include all the basic tools you need to run your business, such as order & project management? Have employees asked to add additional software to the system?
FUNCTIONALITY	Can requests from partners or customers be fulfilled reasonably quickly? Does the software inhibit users from completing tasks? Is the level of user complaints rising?
CUSTOMIZATIONS	Do you have access to the software's source code? Can you easily create new fields, modules, and layouts to suit the needs of your business?
INTEGRATIONS/MOBILE CRM	Do you have multiple non-integrated information stores? Can you access and modify your data using any mobile device? Can you create custom mobile screen layouts for an optimized experience?
SALES & MARKETING	Do your marketers have easy access to sales & marketing data, including planned campaigns and historical results? Can you view your data trends over time for a detailed view of your ROI?

SUCCESS WITH 1CRM

Thousands of businesses use 1CRM everyday to manage and grow their business effectively



"We know exactly where all our orders are at any time. In the CRM we particularly like being able to tie emails to a variety of options such as a contact, a project that we are working on or a marketing effort." - B. Anderson, MADD Virgin Drinks

"1CRM provides Funhaven with the ability to develop a highly customized sales management system that works the way we work, and that provides valuable business insights on key performance indicators that are immediately actionable." - David Ellis, FunHaven

"1CRM has been a very good investment so far and allowed us to grow from zero to a multi-million dollar (sorry, Euros!) business."

- Jacques Gripekoven, ALLOcloud

GET MORE INFORMATION...

www.1CRM.com

