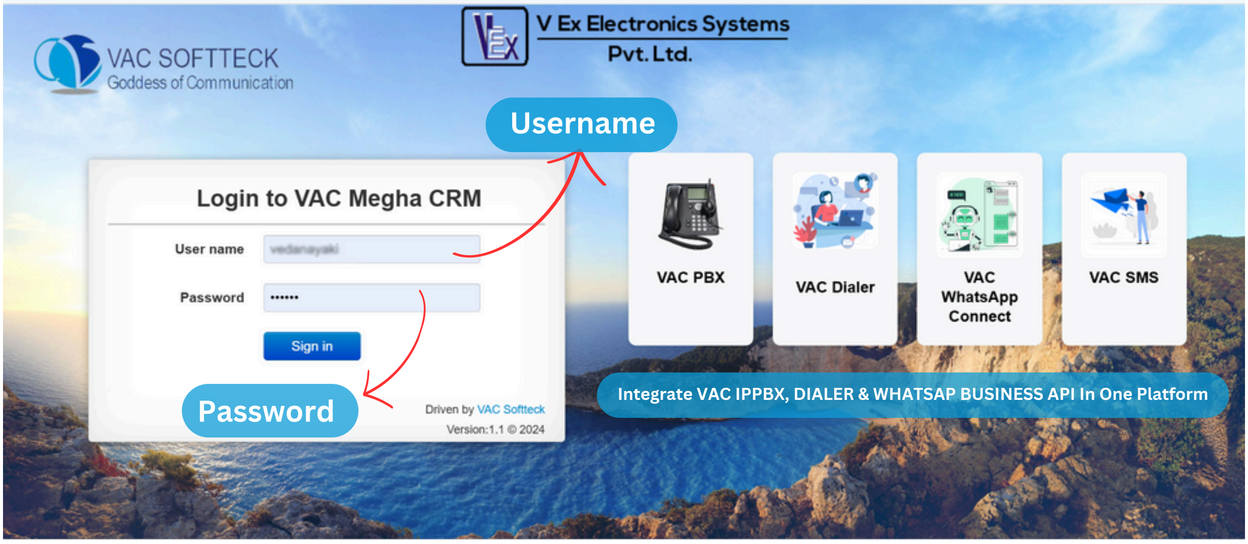
VAC SOFTTECK

Goddess of Communications

Empower Your Business with VAC CRM

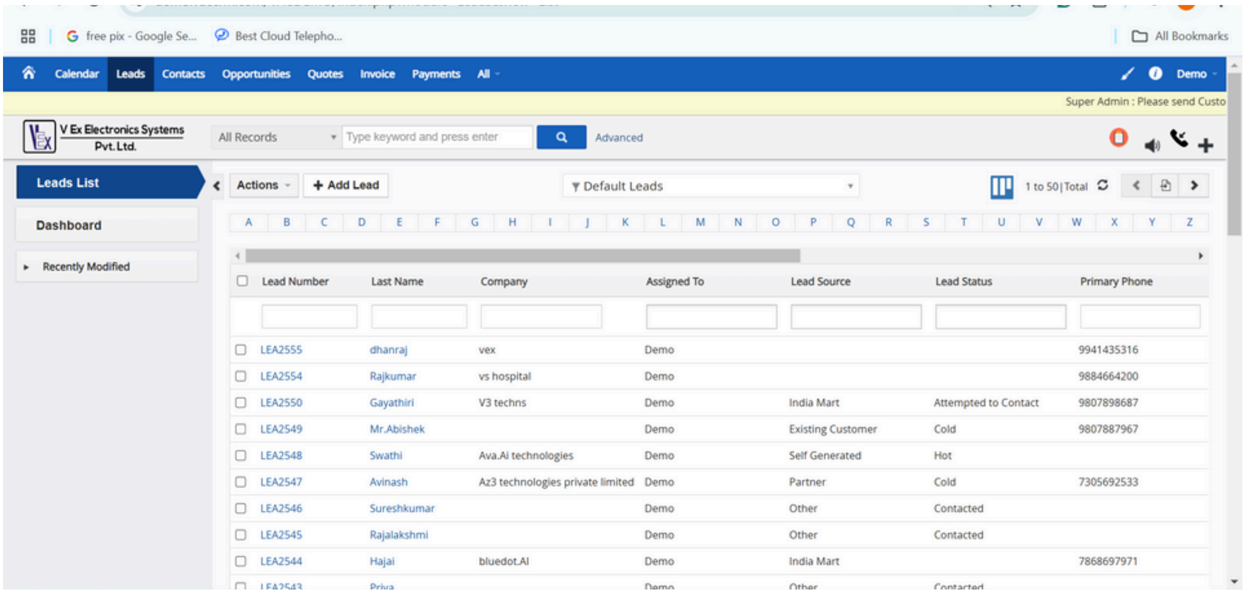
VAC CRM is a powerful tool that captures leads from social media platforms like, Facebook. Linked In, and Google ads. VAC CRM stores all customer details from leads, identifies sales opportunities, manages marketing campaigns, records service issues, and all in one central location.

login Screen:



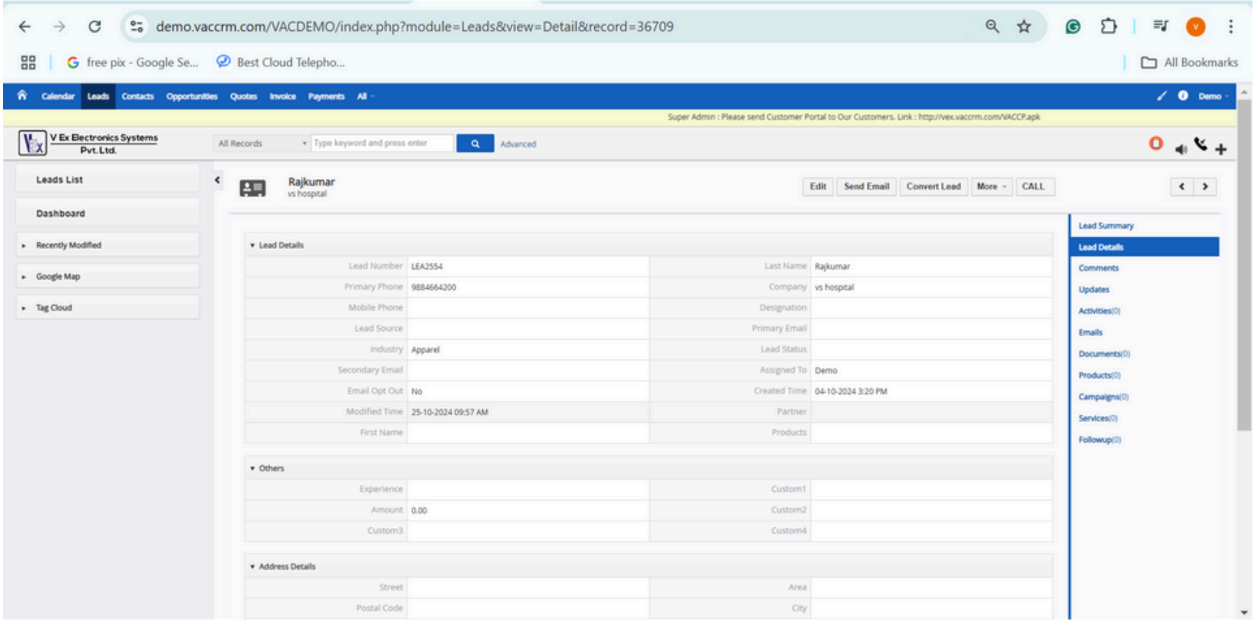
The VAC CRM is a customer relationship management system designed to streamline client interactions and lead management. It includes fields for "Username" and "Password" with a "Sign In" button for secure access. To the right, users can find integration options with VAC PBX, VAC Dialer, VAC WhatsApp Connect, and VAC SMS, enabling seamless communication and enhanced functionality within the CRM.

Lead Module:



VAC CRM is designed to help businesses manage potential customers or "leads" effectively. It allows users to add, view, and organize lead details such as contact information, company, source, status, and assigned representative. The module supports filtering, searching, and sorting, making it easy to prioritize leads based on their status (e.g., Hot, Cold, Contacted) and source (e.g., Partner, Self-Generated). This feature streamlines the lead management process, enhancing sales tracking and follow-up activities within the CRM system.

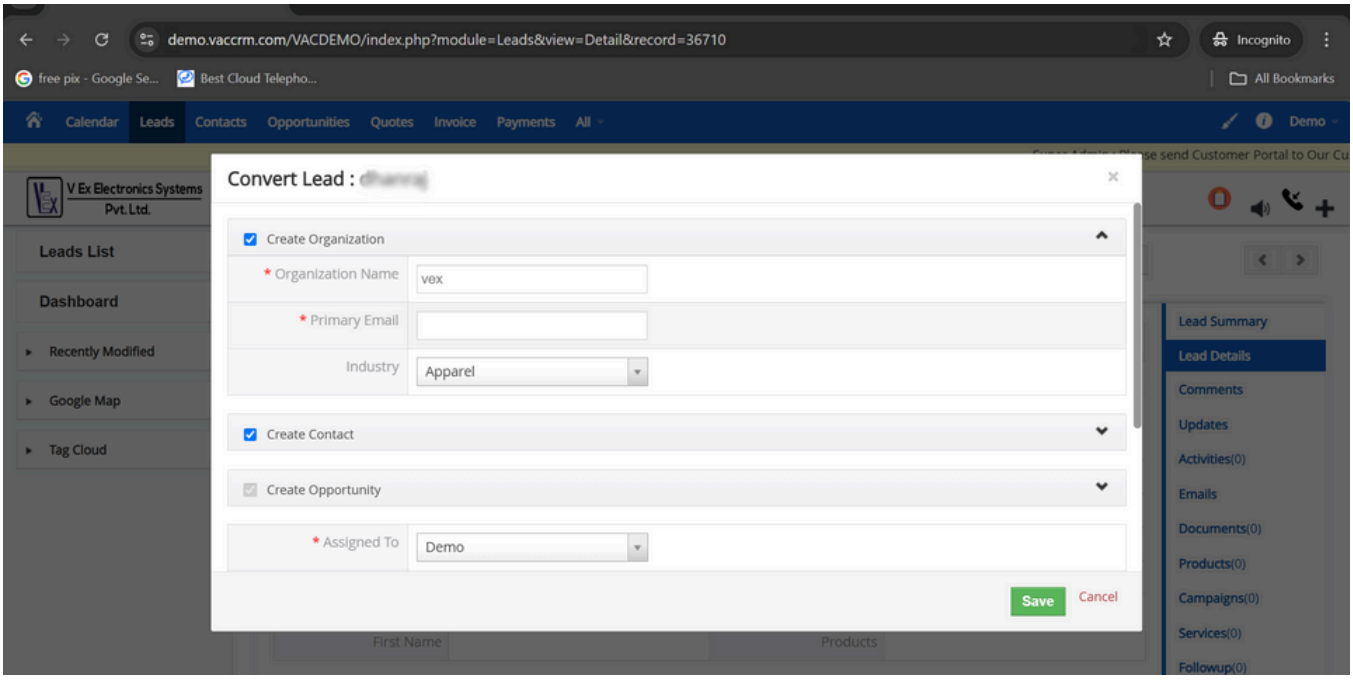
Lead Module:



VAC CRM's lead management module offers a comprehensive interface to manage and track leads effectively. It includes options for follow-ups and adding comments, allowing users to document each interaction with the lead. The centralized view displays essential lead details, such as contact information, industry, assigned representative, and recent modification dates, making it easy to access and update information as needed.

The right sidebar provides quick access to features like comments, updates, activities, emails, and follow-up actions. This structure enables users to keep a detailed record of interactions, ensuring ongoing communication is tracked and organized. By consolidating all lead information and interaction history in one place, VAC CRM makes it easier to manage, nurture, and convert leads efficiently.

Convert Lead:

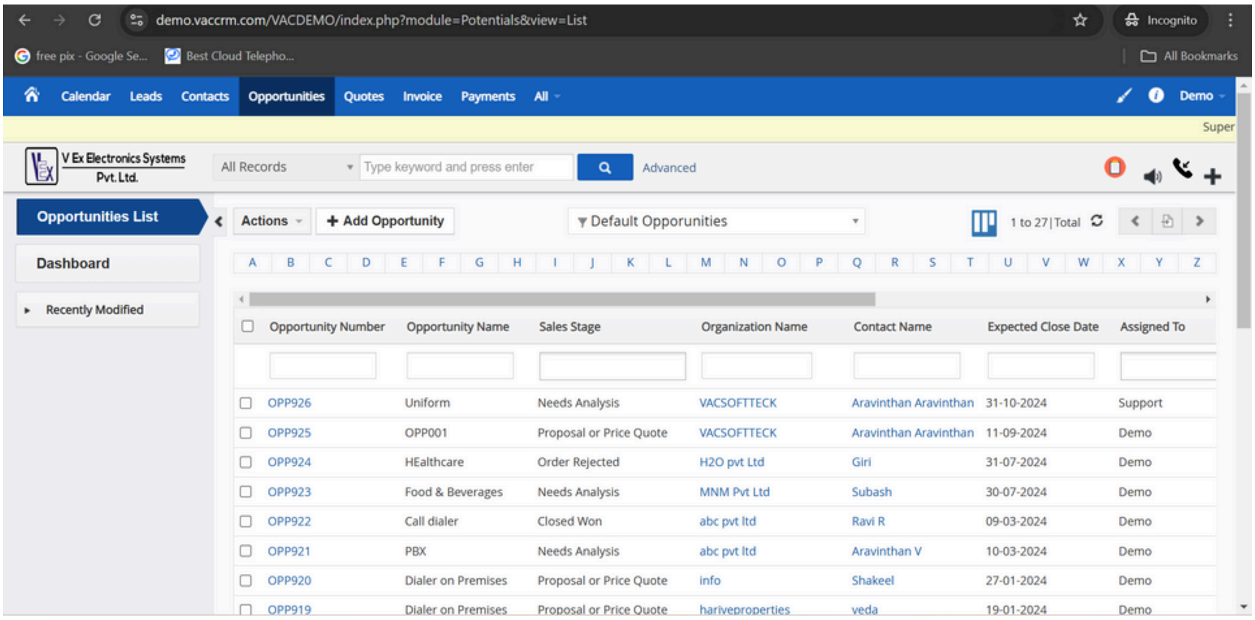


The "**Convert Lead**" pop-up window in **VAC CRM** is designed to simplify the process of converting a lead into an account, contact, and opportunity within the **CRM**.

- Create Organization: Allows users to create a new organization with fields for the organization name, primary email, and industry.
- Create Contact: Provides a checkbox to create a contact associated with the organization.
- Create Opportunity: Includes an option to generate a sales opportunity, with an assignment field to designate the responsible user.

This conversion tool streamlines the transition from lead to formal customer or sales opportunity by automatically generating relevant CRM records and populating them with necessary details, ensuring an organized workflow.

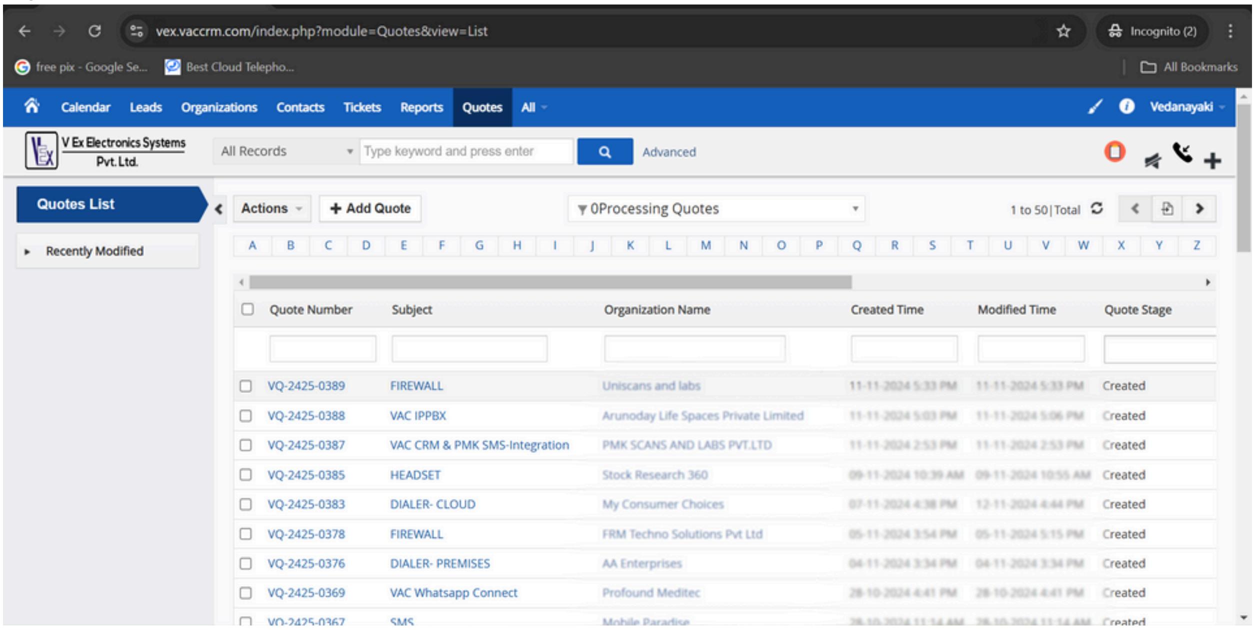
Opportunity Module:



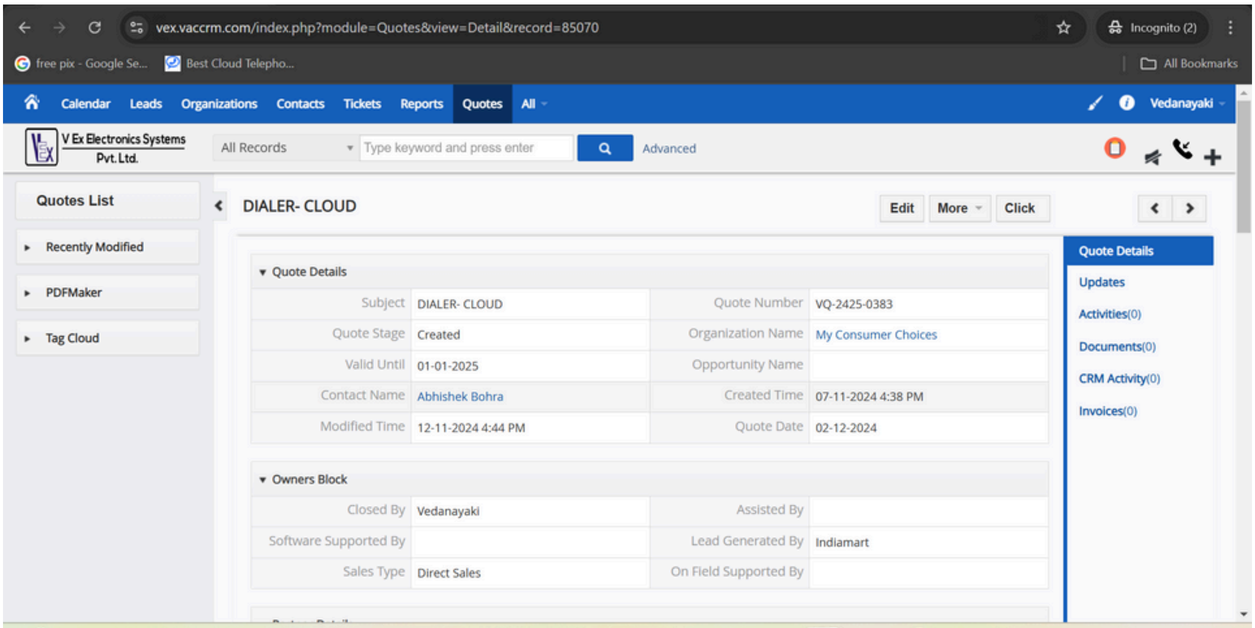
The "**Opportunities**" module in a **VAC CRM** tracks potential deals. Qualified leads are converted into opportunities with details like name, sales stage, organization, contact, expected close date, and assigned team member.

Once in the pipeline, the sales team advances the opportunity through stages (e.g., Needs Analysis, Proposal, Order Won). This module helps monitor progress, prioritize tasks, and manage sales activities effectively. Opportunities are marked "Order Won" for successful deals. Analyzing closed opportunities enhances sales strategy, pipeline management, and revenue forecasting.

Quotes:

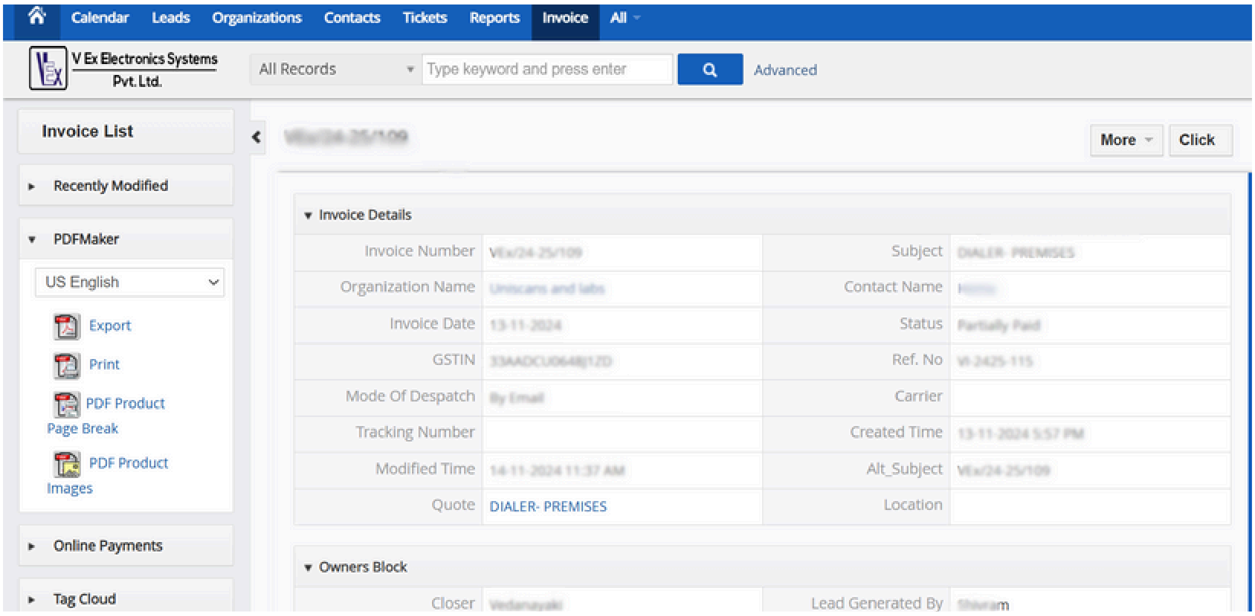


This list includes details about the quotes, such as the product or service in the Subject column, the client in the Organization Name column, and the creation and modification timestamps. The Quote Stage for each entry is marked as "Created," which likely indicates the initial phase of the quoting process.



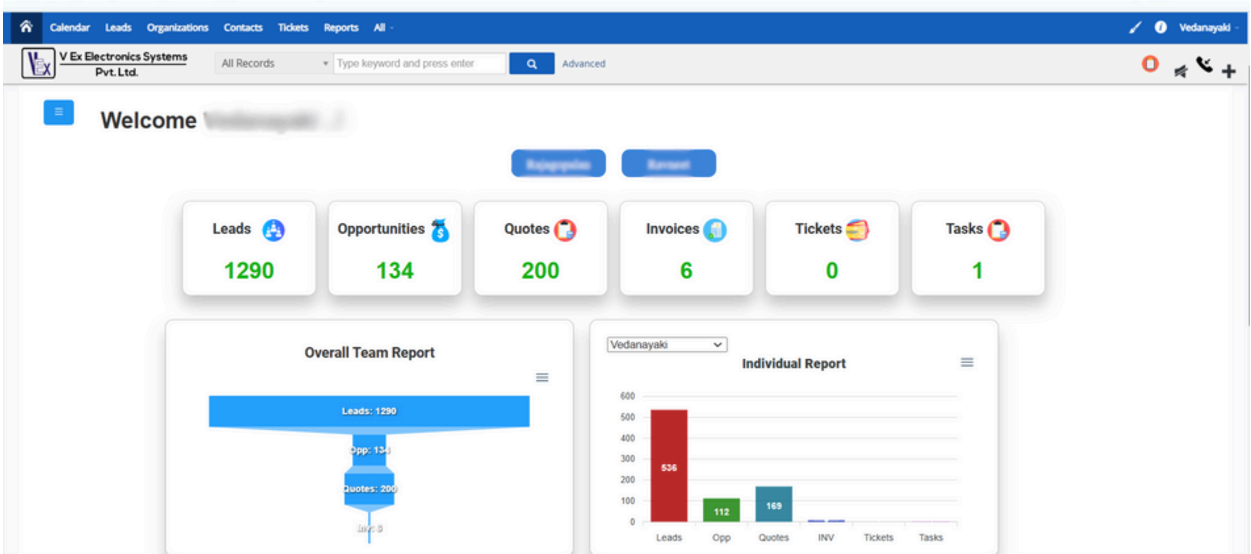
- **Create a New Quote:** Sales representatives start by creating a new quote and filling out all necessary details, including customer information, items quoted, and pricing.
- **Send Quote to Customer:** Once finalized, the quote is sent to the customer for review.
- **Follow Up:** Based on the quote stage, sales reps may follow up with the client if no response is received within a specified time.
- **Update Quote Status:** If the customer accepts the quote, it is updated to an "Accepted" stage and may automatically proceed to order processing. If rejected, sales reps may update the stage accordingly.
- **Convert to Sales Order**: Accepted quotes can be converted to sales orders, initiating the invoicing and delivery process.
- Create Quote → Send to Customer → Follow Up → Update Status → Convert to Sales Order

Invoice:



In a CRM system, the Invoice module is used to generate, manage, and track invoices sent to customers for products or services provided. Once a quote is accepted and converted into a sales order, an invoice can be created with details such as customer information, items purchased, pricing, taxes, discounts, and payment terms. The CRM allows for automated invoice creation, custom templates, and easy tracking of payment statuses (e.g., paid, unpaid, overdue). This streamlines the billing process, helps maintain financial records, and provides visibility into outstanding payments, supporting efficient cash flow management.

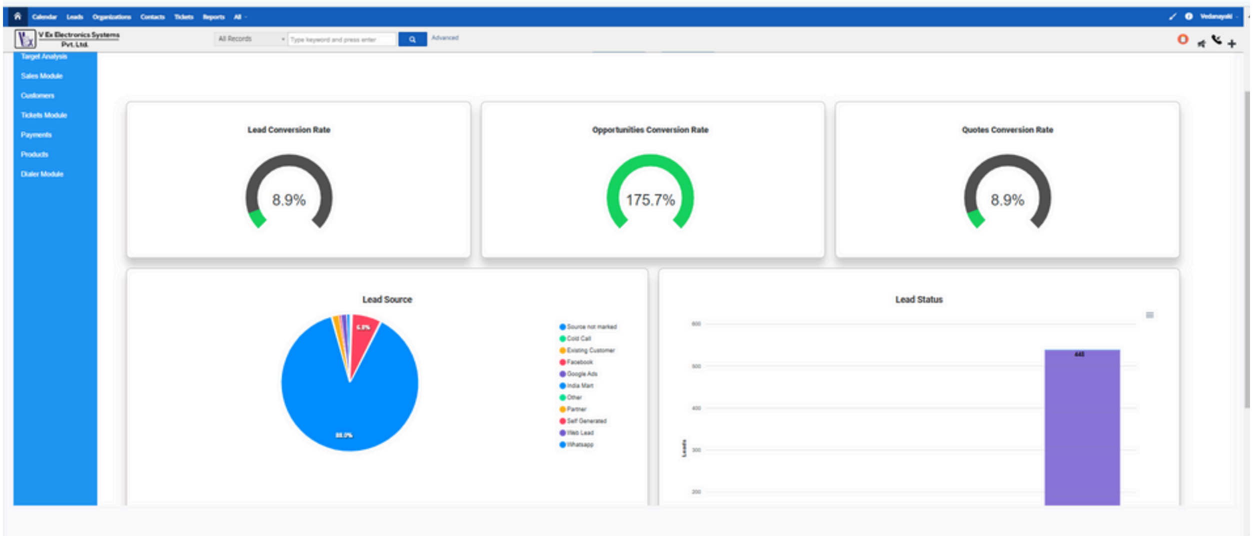
DASHBOARD:



VAC CRM dashboard provides an overview of sales and support metrics, making it easier for users to track performance, manage tasks and monitor client interactions effectively.

Overall Team Report:

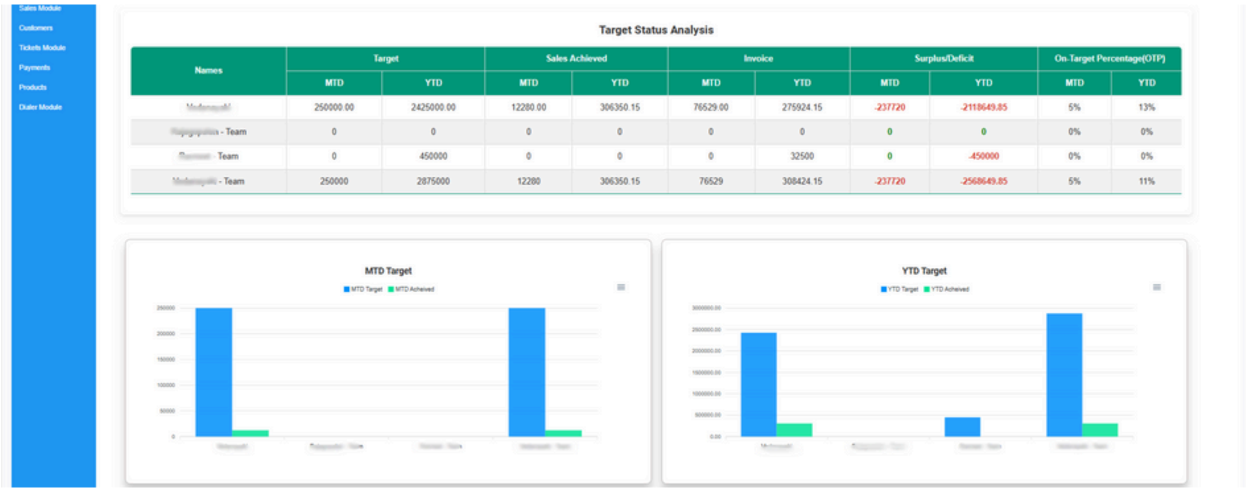
- A funnel chart summarizing the team's activities, including leads, opportunities, quotes, and invoices.
- A bar chart showing individual performance for the user.



The Lead Module is designed to help sales teams manage and track potential customers (leads) efficiently. This module offers valuable insights into lead performance through metrics like lead conversion rates, opportunity conversion rates, and quote conversion rates. It also provides a breakdown of lead sources and tracks the status of each lead.

These insights help sales teams make data-driven decisions to optimize their lead management strategies and improve overall sales effectiveness.

DASHBOARD:



Target Status Analysis

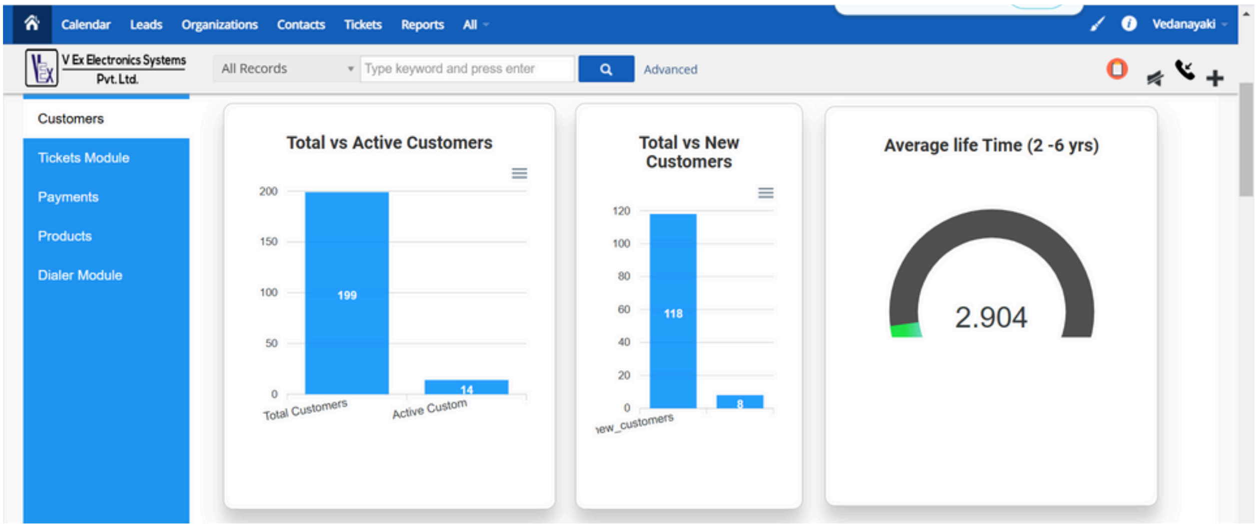
Names	Target		Sales Achieved		Invoice		Surplus/Deficit		On-Target Percentage(OTP)	
	MTD	YTD	MTD	YTD	MTD	YTD	MTD	YTD	MTD	YTD
[illegible]	250000.00	2425000.00	12280.00	306350.15	76529.00	275924.15	-237720	-2118649.85	5%	13%
[illegible] - Team	0	0	0	0	0	0	0	0	0%	0%
[illegible] - Team	0	450000	0	0	0	32500	0	-450000	0%	0%
[illegible] - Team	250000	2875000	12280	306350.15	76529	308424.15	-237720	-2568649.85	5%	11%

Target Status Analysis for different team members. The table provides data on Monthly Target (MTD) and Yearly Target (YTD) in terms of Target, Sales Achieved, Invoice, Surplus/Deficit, and On-Target Percentage. Below the table, there are bar graphs visualizing the MTD and YTD targets versus achieved figures.

Using these visualizations and metrics:

- The team lead or manager can quickly assess each team member's performance.
- The MTD graph is helpful to monitor immediate, short-term achievements and address any gaps within the month.
- The YTD graph provides a longer-term view of progress toward annual goals.

DASHBOARD:



The dashboard provides a quick overview of customer engagement metrics.

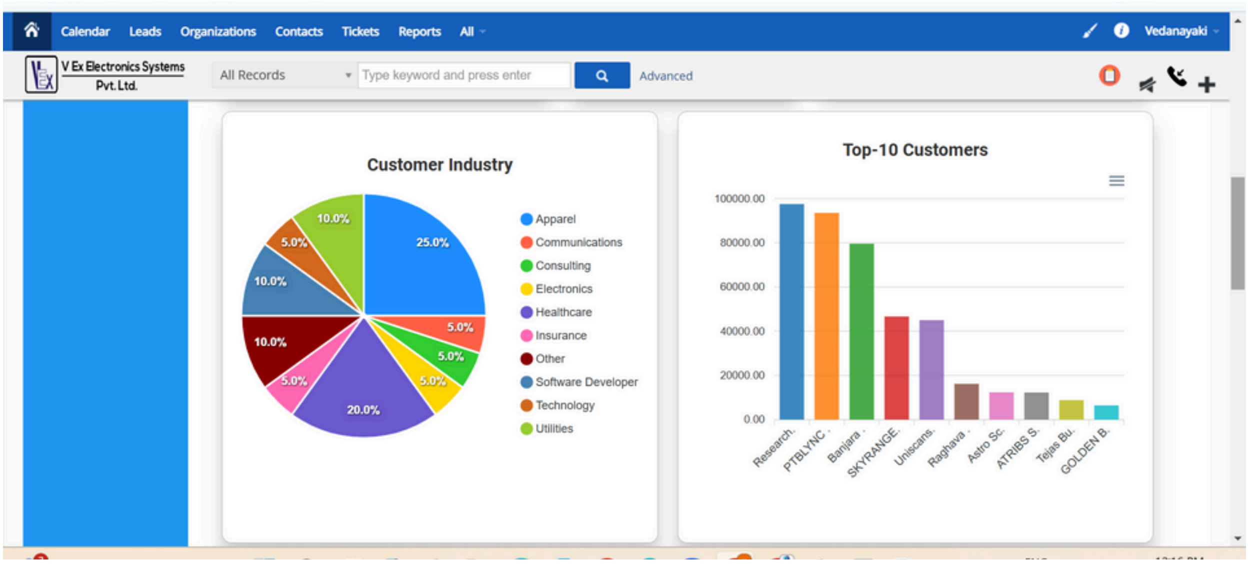
Total vs Active Customers: This metric compares the overall customer base with those who are currently active, offering insight into customer engagement levels.

Total vs New Customers: This metric highlights the number of new customers in relation to the total customer base, providing an understanding of recent customer acquisition trends.

Average Lifetime: This gauge shows the average customer retention time, indicating how long customers typically remain engaged with the company.

Together, these metrics provide valuable insights into customer acquisition, engagement, and retention, supporting strategic decisions in customer relationship management.

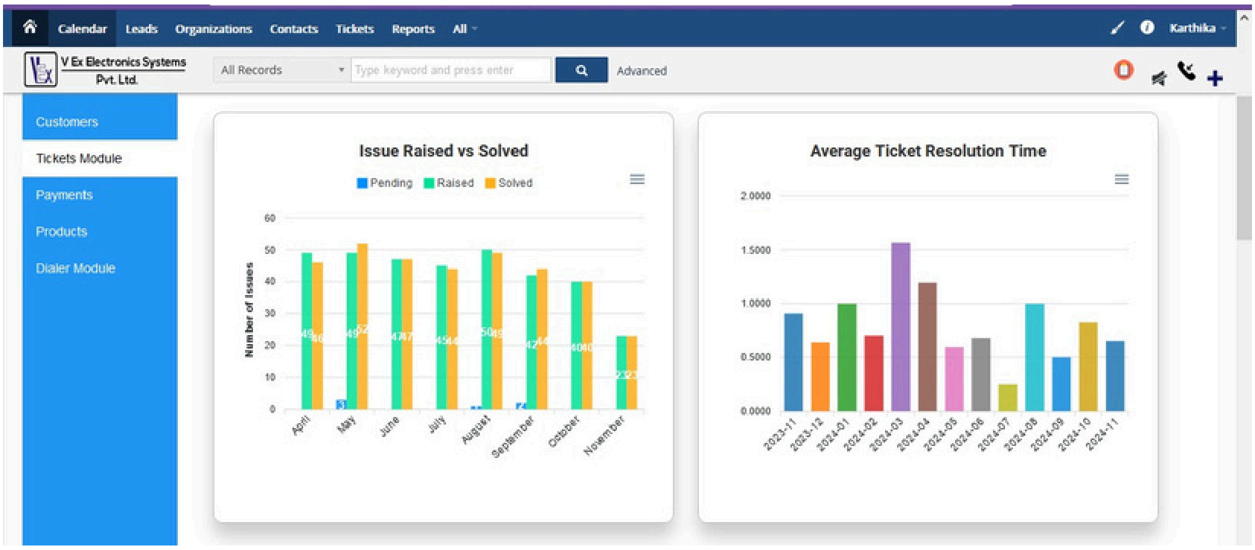
DASHBOARD:



The dashboard's Customer Industry section illustrates a breakdown of customer distribution across various sectors, highlighting key industries that make up the largest segments. This data allows the team to identify priority sectors, enabling targeted marketing and service enhancements. By focusing on specific customer needs within these key industries, the team can develop tailored strategies that improve engagement and satisfaction.

The Top-10 Customers bar chart showcases the highest-value customers based on revenue or engagement. This information is crucial for resource prioritization, allowing the team to invest in nurturing relationships with these top customers. By strengthening connections and exploring strategic partnerships with these high-value clients, the team can drive both growth and customer retention, aligning with broader business goals.

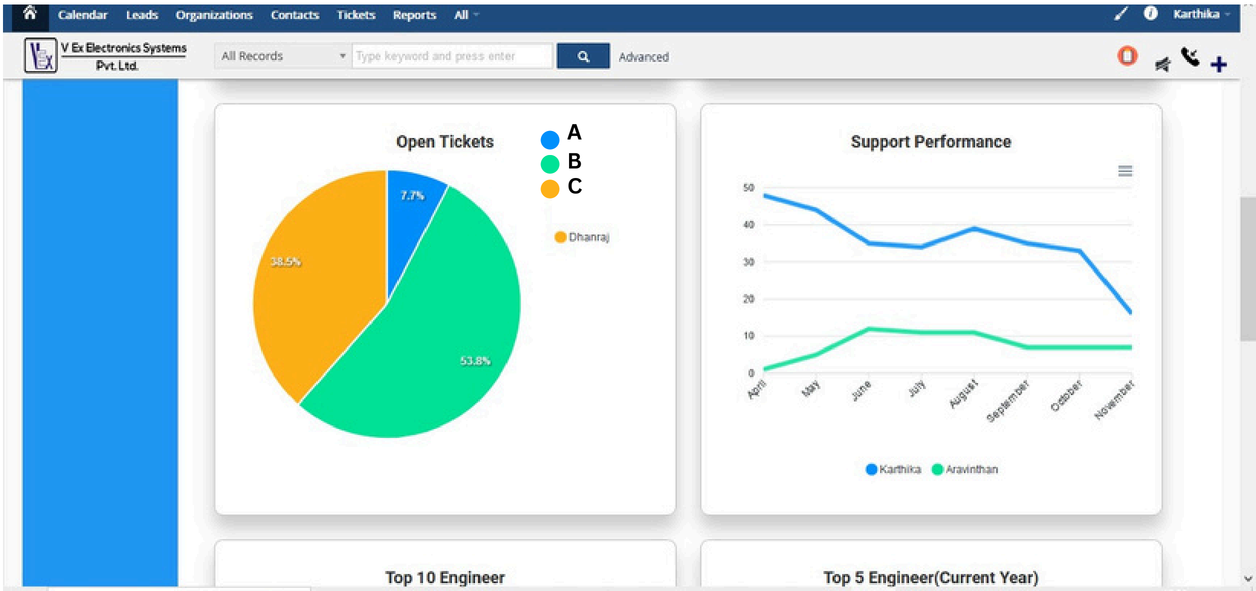
TICKET MODULE:



The dashboard's Issue Raised vs Solved section provides an overview of the ticketing status over several months, showing the number of issues raised, solved, and pending. This data helps the team monitor workload and resolution efficiency, as they can quickly identify if any month has an unusually high number of unresolved issues. A steady count of raised and solved tickets implies consistent performance, while fluctuations may indicate areas that need additional resources or attention.

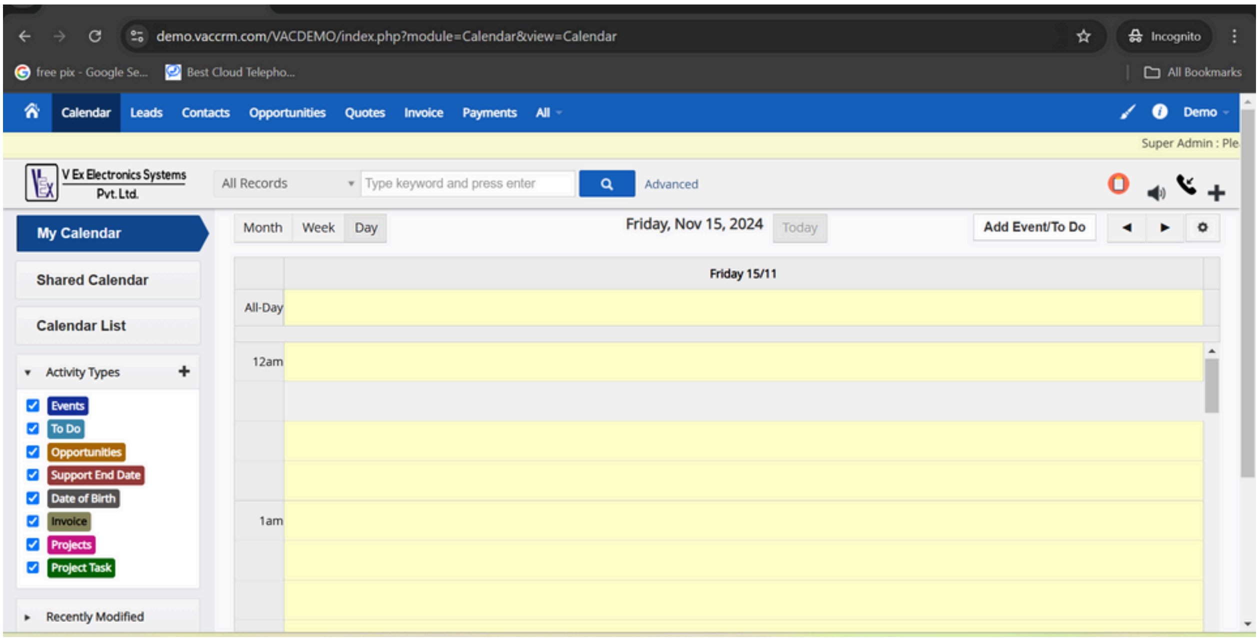
The Average Ticket Resolution Time chart illustrates the average time taken to resolve tickets each month. This metric is crucial for tracking customer service efficiency and identifying any months where the resolution time is significantly higher. Faster resolution times indicate effective support performance, while higher times suggest potential bottlenecks that may require process improvements.

TICKET MODULE:

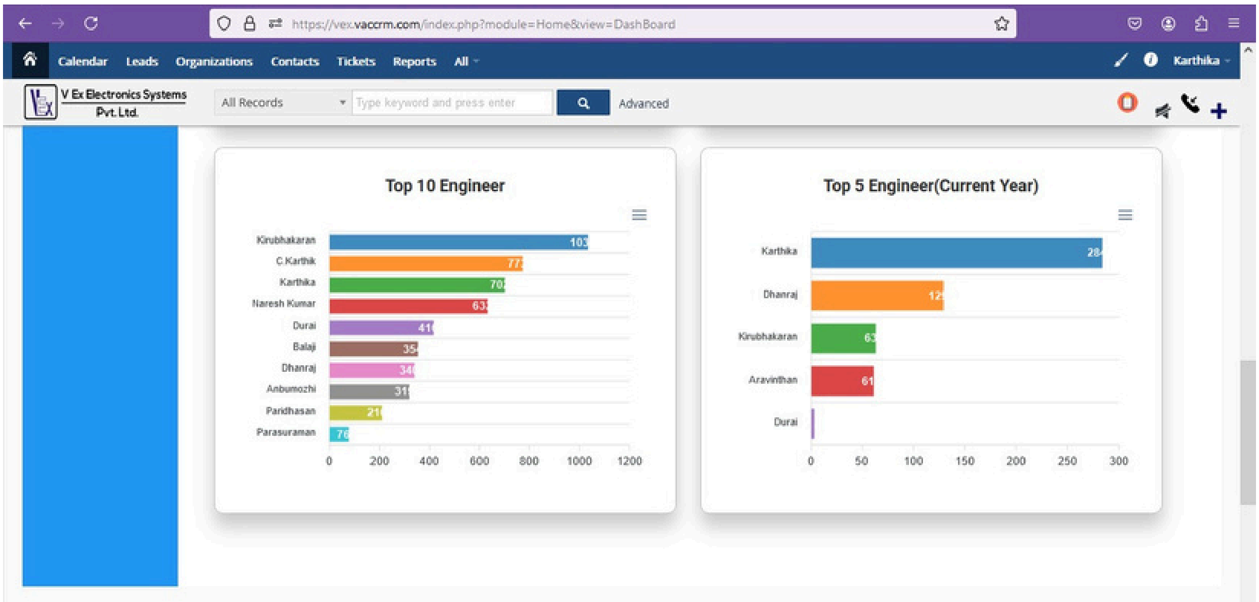


The Open Tickets chart provides a snapshot of current open tickets assigned to various team members, essential for assessing workload distribution. This visual breakdown allows the team to identify which member is managing a higher load, which can help in reallocating tasks for optimal efficiency. For example, Team Member B has the largest portion of open tickets at 53.8%, while Team Member A handles only 7.7%. This information supports better resource allocation, ensuring tickets are resolved promptly.
The Support Performance line chart monitors the performance of team members over time, capturing changes in their effectiveness. This chart reveals patterns that can indicate areas needing attention or support improvements. For instance, Team Member B's performance shows a downward trend over the months, while Team Member C maintains a steady level of support. Such insights enable management to make informed decisions on training, resource focus, and performance enhancements to boost team effectiveness.

CALENDER MODULE:



The CRM calendar interface allows users to manage and track schedules, events, and tasks. It provides options to view calendars by day, week, or month, with customizable activity types like events, to-dos, and projects. Users can add new items, navigate dates, and toggle categories on or off to organize and visualize their tasks efficiently.



It shows two bar charts representing engineer performance metrics:

Top 10 Engineers (left chart): This chart ranks the top 10 engineers based on their overall performance scores.
Top 5 Engineers (Current Year) (right chart): This chart highlights the top 5 engineers for the current year based on their performance scores.
Each chart provides a visual comparison of individual contributions, with bars indicating the score achieved by each engineer.

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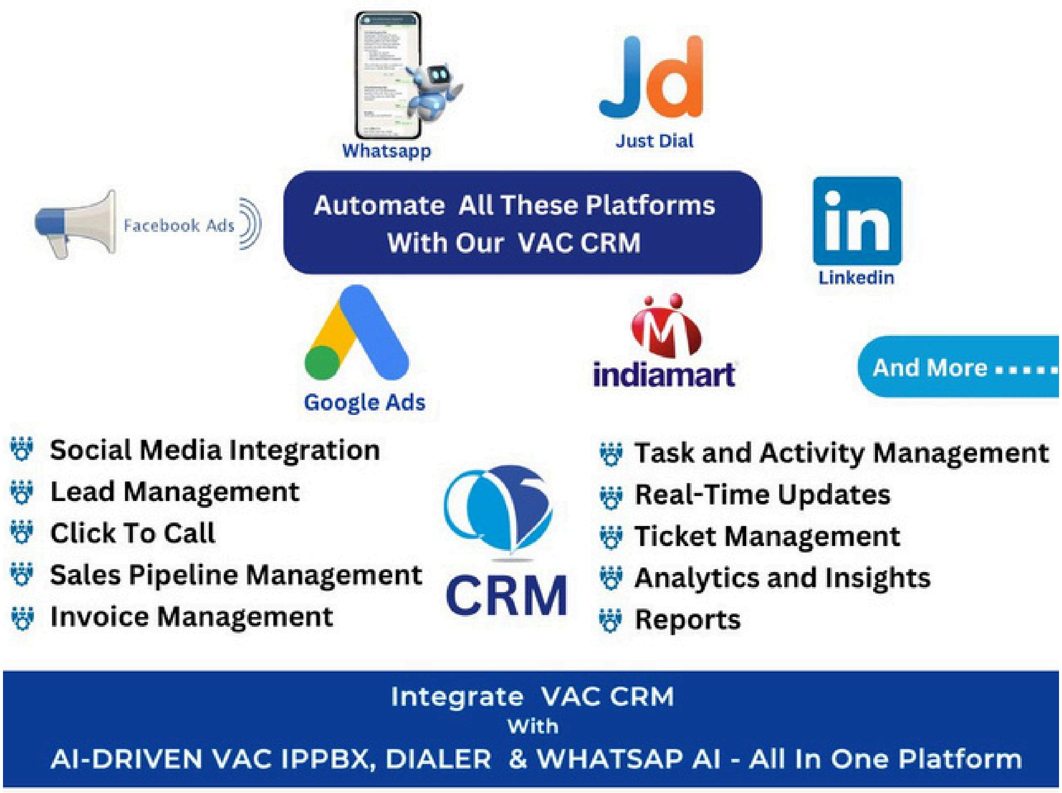
Cloud / Premises

Key features and benefits of VAC Call Center software:

The VAC CRM software is presented as a comprehensive platform that supports both cloud and on-premises deployment options.Additionally, VAC CRM integrates VAC IPPBX, Dialer, and WhatsApp Connect with AI capabilities, providing a unified platform for customer relationship management



The lead management system is fully integrated with Facebook and Google Ads, Just dial, Indiamart, instagram, Linkedin , sulekha, and more. Get all leads under one roof and get rid of juggling multiple apps.

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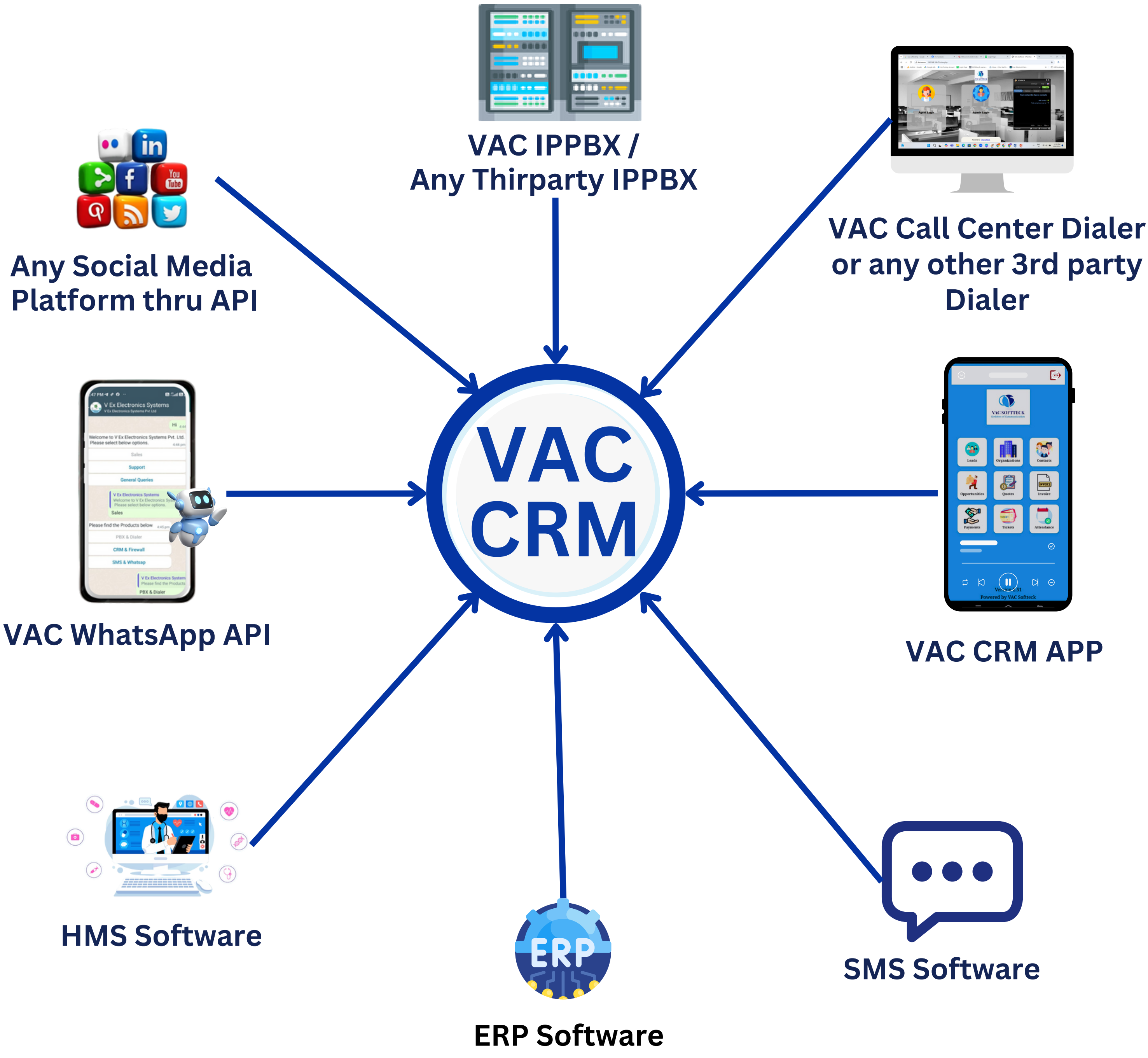
Cloud / Premises

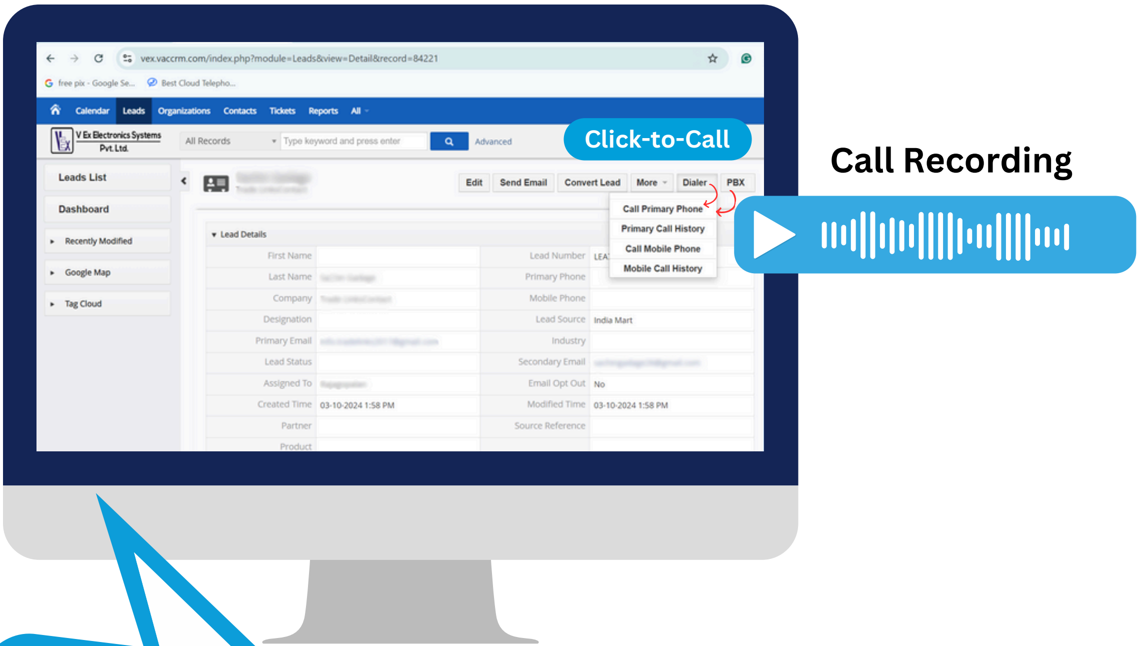
Possible Integration with CRM



VAC CRM is a versatile solution that seamlessly integrates with VAC PBX, VAC Dialer, or any third-party CRM, dialer, and IPPBX. This adaptability ensures smooth communication, efficient lead management, and enhanced productivity, meeting diverse business requirements with ease.

VAC CRM simplifies and streamlines lead management by enabling businesses to track, nurture, and convert leads efficiently.

Click to Call



Use Click to call from the contact page. Get call recordings stored in the same page for future reference.

Implementing a "click-to-call" feature with call recording functionality involves several steps, including using a VoIP service or telephony API (like Twilio, Plivo, or Nexmo) that supports click-to-call and call recording.

- Set Up Click-to-Call
- Use API for Click-to-Call
- Handle Call Recording
- Display Recordings on the Contact Page

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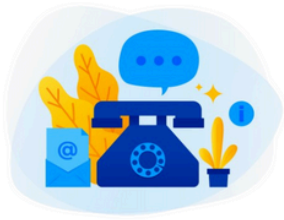
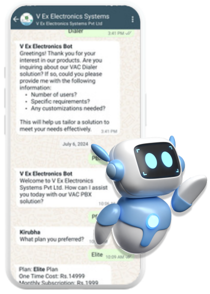
VAC DIALER

VAC DOC
HOSPITAL MANAGEMENT SOFTWARE



VAC IPPBX



VAC SMARTTICK WITH AI

Thank You

VAC CRM

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Satvat Holistics
For the body, mind and spirit

rela Hospital

SRMPR Global Railways

KTV

PEEPAL PRODIGY SCHOOL

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SRMC Chennai
Sri Ramachandra Hospital Chennai

LY softwares RPA

Integrate VAC CRM
With
AI-DRIVEN VAC IPPBX, DIALER & SmartTick - All In One Platform

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