

# vTiger CRM Services

Enhanced focus on Lead and Support Desk Management



## vTiger Competency

vtiger CRM is an open source application. Built on the LAMP/WAMP (Linux/Windows, Apache, MySQL, and PHP) stack with code from other open source projects such as SugarCRM, is a widely used CRM product with thousands of users in dozens of countries.

vTiger CRM also provides enterprise business productivity enhancement add-ons, Customer Portal, Outlook Plug-in for Microsoft Outlook users, Office Plug-in for Microsoft Word users, and Thunderbird Extension for Thunderbird mail users.

Raybiztech has developed proven expertise in providing customized Vtiger CRM solutions for clients' business needs. Our experienced open source team will help you to realize the full potential of your vTiget CRM implementation at a competitive cost.

We offer different customized services with Vtiger

- Vtiger Open Source CRM
- Vtiger Feature Development
- Vtiget Customization
- Vtiger Installation Services

Raybiztech open source team has excellent experience in vTiger implementation and migration services, training and consulting plus technical support for the installations and vtiger customization.

Our vTtiger CRM Services includes sales force automation, customer support & service, marketing automation, inventory management, multiple database support, security management, product customization, calendaring, email integration and multiple add-ons with MS Office plug-ins, Thunderbird extension, customer self-service portal, and WebForms among them. Being Customer-centric and experienced in Vtiger CRM custom development, our technical team is capable to provide integration of existing modules or development of new ones.

## Modules Details

### Sales Force Automation

vtiger CRM supports a number of different aspects of Sales Force Automation.

#### Lead Management

Sales leads are a vital resource for sales and vtiger CRM offers sales teams a full range of lead management functions.

- Manage leads end-to-end (from creating leads to converting them into opportunities)
- Capture leads directly from your Web site and transfer to vtiger CRM
- Customize online lead form as per your organization requirements

- Import leads from external sources, such as Web downloads, trade shows, seminars, direct mail, and other types of campaigns
- Add multiple products to the leads
- Qualify leads to next stage based on information captured in lead details
- Convert leads into sales opportunities, accounts, and contacts with a single-click
- Lead conversion mapping for all the custom fields
- Create fully customizable lead reports
- Export leads to spreadsheet software, such as Microsoft® Excel®, OpenOffice®, and others for further analysis

### Opportunity Management

Opportunity Management is another important sales function covered by vtiger CRM. Opportunities are labeled Potentials in vtiger CRM. vtiger includes the following features for Opportunity Management:

- Track all sales opportunities end-to-end in a sales cycle
- Associate opportunities with accounts, contacts, activities, and other modules to have a better visibility on the opportunities
- Generate quotes, sales orders, and invoices from the potentials
- Create fully customizable opportunity reports
- Export opportunities to spreadsheet software, such as Microsoft® Excel®, OpenOffice® and others to analyze the sales pipeline and quickly identify the bottlenecks if any

### Account Management

- Track all accounts and related contacts, opportunities, cases, and other details from a common repository
- Specify parent-child relationships between accounts and their subsidiaries or other divisions • Import accounts from external sources, such as ACT, GoldMine, and other applications • Generate quotes, sales orders, and invoices for the accounts
- Track purchase history of the customers and analyze opportunities for up selling and cross selling
- Create fully customizable account reports
- Export accounts to spreadsheet software, such as Microsoft® Excel®, OpenOffice®
- Attach customer-specific documents to accounts for a quick reference in future

### Contact Management

- Track all contacts and related opportunities, cases, activities, and other details from a common repository
- Create the hierarchy of contacts within a company to have a better coordination while dealing with customers
- Export contacts to spreadsheet software, such as Microsoft® Excel®, OpenOffice®, for further analysis
- Synchronize contacts with Microsoft® Outlook®

### Activity Management

- Add all important customer-related e-mails to vtiger CRM for quick reference in future
- Store all the details of customer meetings and calls in a n intuitive calendar

## Reports & Dashboards

- Pre-build reports for sales force automation
- Sales pipeline analysis by stage
- Monthly Sales pipeline analysis
- Sales opportunities by lead source

## Customer Speaks

“I am so happy that the application is successfully launched and our affiliates are happy (no complaints). Team, you have done a wonderful job keeping in mind the performance and scalability requirements in mind. Whatever little doubt that I had about the lead management system being flexible and able to handle such diverse lead sources without much hassle is such a relief. Kudos to the team. I am very pleased with the application launch and I am confident that we can go to great lengths with the confidence from our valuable partners”

**- CEO of leading USA marketing on Lead Management Implementation**

“Raybiztech team has done a wonderful job of understanding our support process and translating it into a workable system quickly. Their expertise in vTiger CRM has come to good use as we tried to launch a support desk for a very important client of ours in a quick time. Raybiztech team worked with our support team in understanding the process, customizing the tool and implementing the custom rules as required. Their were available all the time to make our go-live a success. I wish to congratulate the team from Pioneer and Raybiztech and extend my sincere appreciation for a great delivery.”

**- VP, Sales & Marketing of leading IT Company on Support Desk implementation on vTiger**

## Contact Ray Business Technologies Private Limited

### United States of America

#### Dallas, Texas

5050 Quorum Drive  
Suite 700 #114  
Dallas, TX 75254  
Tel: +1 - 214 838 3522/23

#### Los Angeles

19720 Ventura Blvd.,  
Suite A, Woodland Hills,  
CA 91364  
Tel: +1 786 600 1743

### India

#### Hyderabad

Plot No. 204, Block B, Kavuri Hills,  
Next to IGNOU, Madhapur,  
Hyderabad- 33  
Tel: +91-40-2311 8011/22  
x:101/102

#### Mumbai

439, Laxmi Plaza, Link Road,  
Andheri West, Mumbai 400053  
Tel: +91 98497 43823

### United Kingdom

5 Lisbon Way  
Coventry, CV3 2AQ  
Tel: +44 2476 443 871

### UAE

Office: 507  
CEO Building  
Dubai Investment Park:1  
Dubai  
Tel: +971 48-800 090