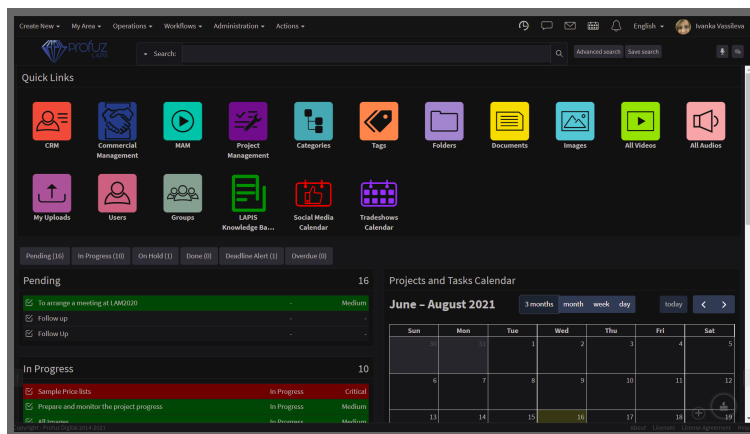




# Customer Relationship Management (CRM)

## Profuz Lapis Overview



Profuz Lapis is an enterprise-class web-based Business Processes and Information Management system. Its purpose is to bring under one roof all processes and data with which an organization operates. Profuz Lapis adapts to your business instead of the other way around.

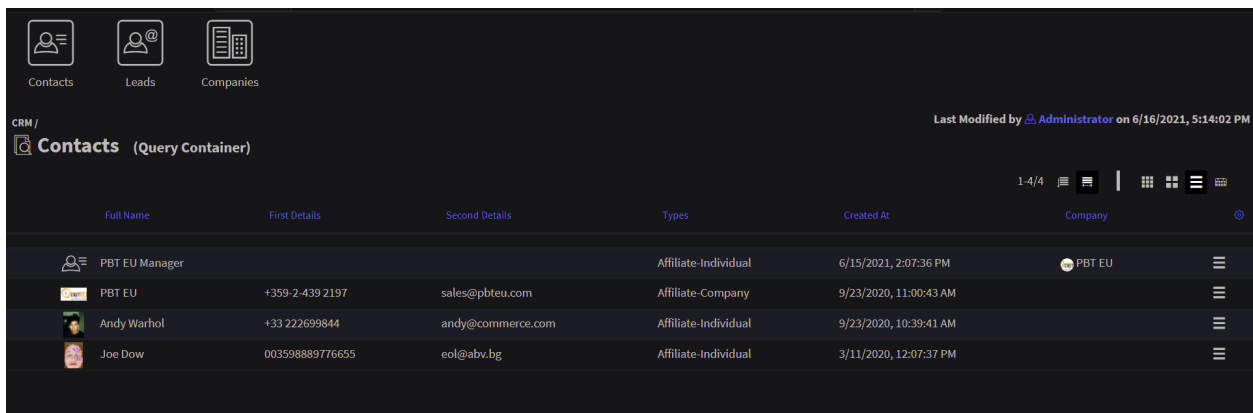
## Customer Relationship Management (CRM)






Profuz Lapis CRM centrally manages your contacts data in real time and stores it securely in one single place under your own control. Your clients, partners, employees and suppliers data is always up to date and easily accessible from anywhere. The contact details are classified and structured in an easy to find way. Contact details are protected and their access is under your control. The commercial process is predictable and unified. The sales and marketing activities are synchronized and in line with the data protection regulations.

# What Features does LAPIS CRM offer?

## Contact Management

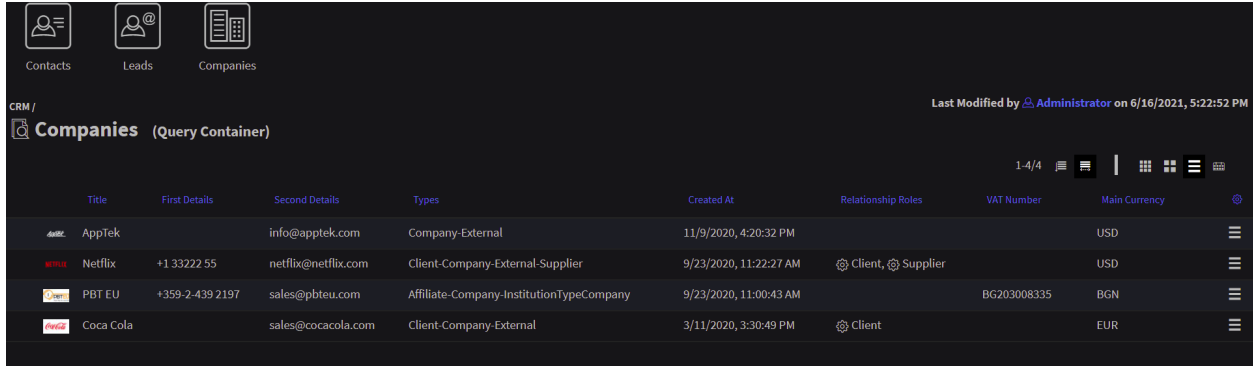
- **Multiple ways of contacts categorization based on various criteria**
  - Affiliate and external contacts
  - Individual and company contacts and connection between them
  - Leads, prospects, clients, partners, vendors
  - Active/inactive contacts
  - Subscribed/unsubscribed for email marketing activities such as newsletters, product announcements, sales promotions, etc.
  - Tags, categories, folders, parameters and attributes for custom classification as per your company needs



Full Name	First Details	Second Details	Types	Created At	Company
 PBT EU Manager			Affiliate-Individual	6/15/2021, 2:07:36 PM	 PBT EU
 PBT EU	+359-2-439 2197	sales@pbteu.com	Affiliate-Company	9/23/2020, 11:00:43 AM	
 Andy Warhol	+33 222699844	andy@commerce.com	Affiliate-Individual	9/23/2020, 10:39:41 AM	
 Joe Dow	003598889776655	eol@abv.bg	Affiliate-Individual	3/11/2020, 12:07:37 PM	

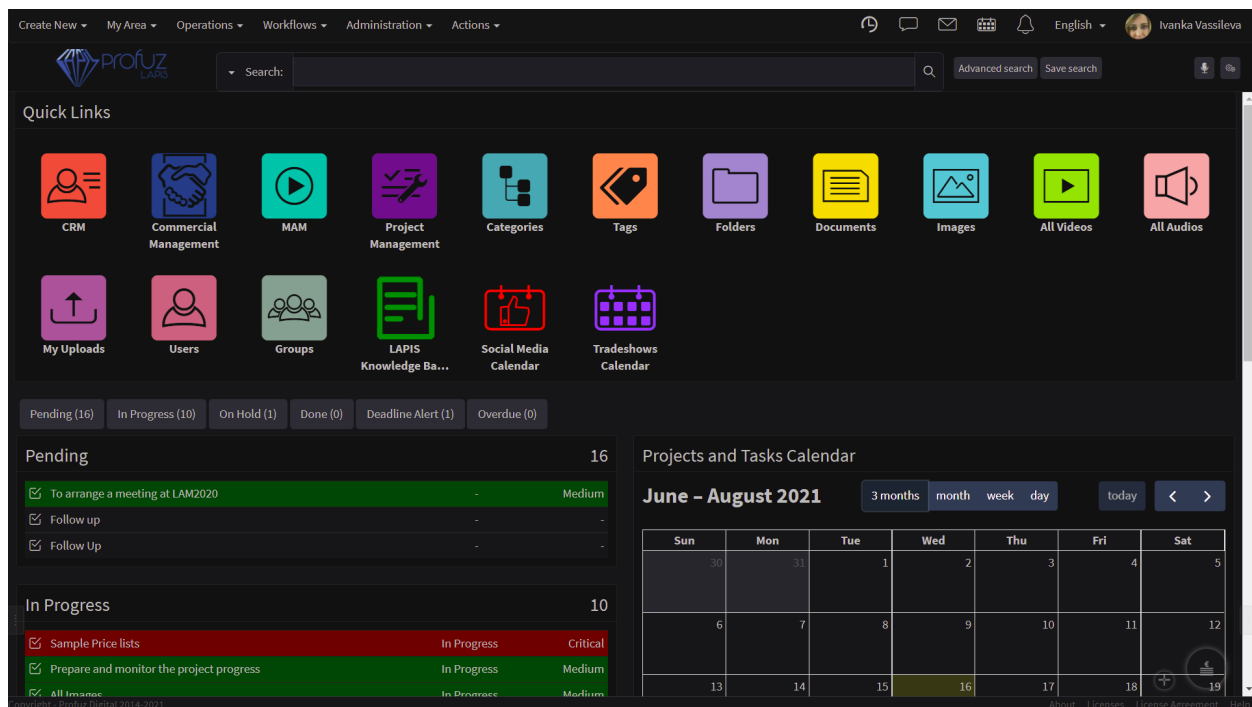
- **Views**
  - Default fields include Full Name, Notes, Image, Company, Address, Emails, LinkedIn, Twitter, Facebook, Skype, Website URL, Phone Numbers, Contact Type (Internal/External), Active/Inactive, Sales Status (Lead, Prospect, Client), Lead Status (Qualified, Not Qualified, To Be Contacted, Contacted), Relationship Role (Client, Supplier, Partner), Civility Code, Company Position, Hierarchical Manager, Department, and Marketing Activities
  - If Contact is a Company, additional fields available include: Accountable Person, VAT number, Company ID, Juridical Status, Payment Terms, Billing Documents, Institution Type, Staff Count, Capital, and other company-related parameters

- Activities list for history of changes, communication and live comments
- Custom Fields defined by user
- Easy creation of users accounts from contacts
- Monitoring of tasks, projects, orders, deals, invoices, documents in which contacts are involved
- Import/Export of contact databases



Title	First Details	Second Details	Types	Created At	Relationship Roles	VAT Number	Main Currency
AppTek		info@apptek.com	Company-External	11/9/2020, 4:20:32 PM			USD
Netflix	+1 33222 55	netflix@netflix.com	Client-Company-External-Supplier	9/23/2020, 11:22:27 AM	Client, Supplier		USD
PBT EU	+359-2-439 2197	sales@pbteu.com	Affiliate-Company-InstitutionTypeCompany	9/23/2020, 11:00:43 AM		BG203008335	BGN
Coca Cola		sales@cocacola.com	Client-Company-External	3/11/2020, 3:30:49 PM	Client		EUR

- **Users management, automations and collaboration**
  - Easy way of creating users accounts from contacts
  - Folder-specific Permissions and User Rights for Create, Edit, View, Export, Import, Delete, etc.
  - Individual and groups access control
  - User roles
  - Track Users interactions through Activity Logs, Task Assignments, etc.



- 1-1 or group chats
- Secure sharing of internal data with other users through chats, comments, projects, tasks, etc.
- History of chat sessions
- Email and in-app notifications for changes, updates and assignments
- Email communication management and logging
- Automatic workflows based on client's needs

## Sales Management

### Sales Deals Management







- Deals tracking, management and reporting
- Reporting and statistics per sales person, deal source, stage, due date, payment terms, payment methods and other criteria
- Automatic creation of sales quotes based on information from the sales deals

- Customization of deal parameters and stages to reflect your organization sales process and needs
- Customizable dashboards with calendar of activities, to dos and reports based on roles

Commercial Management / Sales / Last Modified by [Administrator](#) on 6/16/2021, 5:31:22 PM

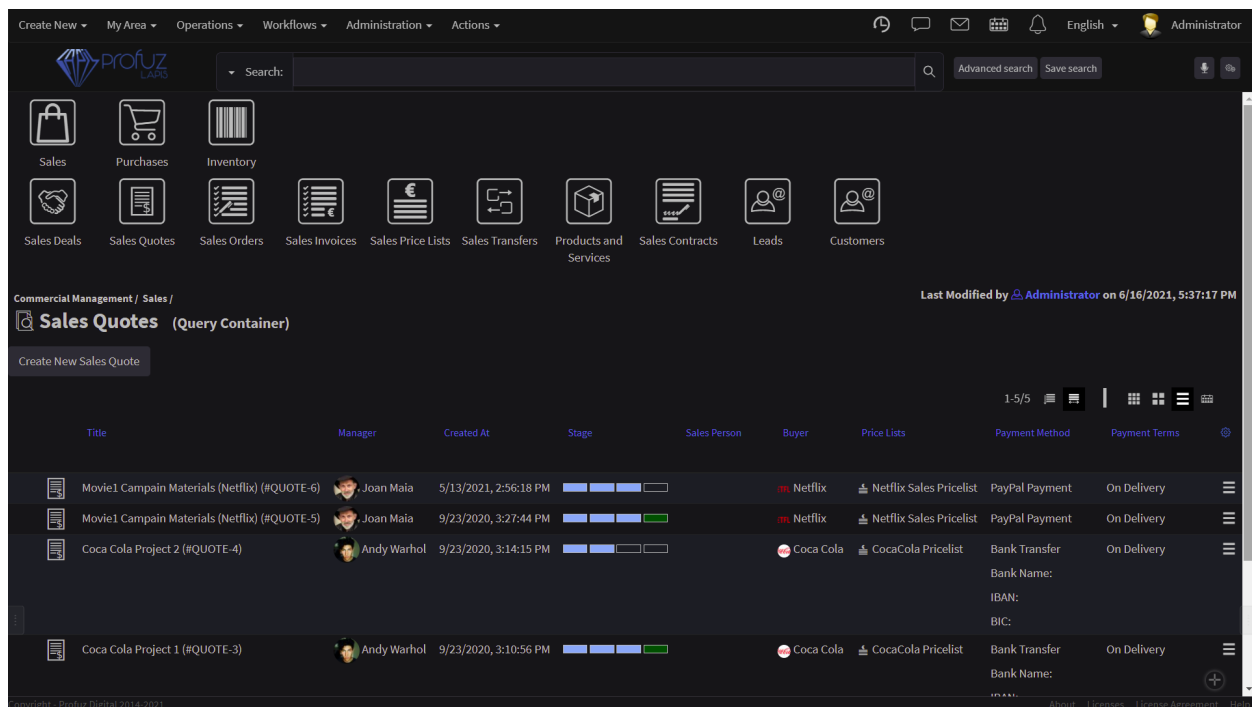
**Sales Deals** (Query Container)

1-3/3

Title	Manager	Types	Stage	Close Date	Probability
 Movie1 Campain Materials (Netflix) (#DEAL-13)	 Joan Maia	Sales Deal	<div><div></div><div></div><div></div><div></div><div></div></div>		
 Coca Cola Project 2 (#DEAL-11)	 Andy Warhol	Sales Deal	<div><div></div><div></div><div></div><div></div><div></div></div>		
 Coca Cola Project 1 (#DEAL-10)	 Andy Warhol	Sales Deal	<div><div></div><div></div><div></div><div></div><div></div></div>		

## Sales Quotes Management

- Sales Pipeline including quotes tracking, management and reporting based on currency, sales person, due date, stage, validity, client, etc.
- Default fields include Client Name, Close Date, Currency, Per Item and Total Value, Price Lists, Client Contact, Sales Person in Charge, Payment Terms, Payment Method, etc.



- Default stages for quotes are Qualification, Sent to Client, Reviewed by Client, Approved/Declined) and there is a possibility to add or remove stages if needed during system setup or after deployment without losing information
- Multiple parameters for filtering quotes such as Date Created, Creator, Owner, Currency, Payment Method, Payment Terms, Shipping Methods, Amounts, etc.
- Quote generation in pdf format based on provided by your organisation quote template(s) and sending e-mail with attached pdf through the system
- Possibility to have multiple quote templates to choose from, if needed
- Reports in multiple formats such as bar charts, pie charts, tables, etc.

- Real-time reporting using search templates, search sessions and advanced search parameters
- Custom views and dashboards are possible for sales team and sales managers

### **Sales Calendar**

- Scheduling meetings, calls, follow ups, to dos, etc.
- Reminders
- Daily, weekly, monthly and 3-months activities monitoring
- Filtering of calendar activities based on sales person, period, type of activity, etc.
- Email notification for upcoming activities, due dates, follow ups, etc.

### **Document Management**

- Create, Edit, Approve and other collaborative operations on generating quotes, contracts with clients or other text files
- History of changes
- Search and filtering of documents based on date of creation, creator, owner or other parameters if added to documents metadata
- Watermarking of documents for confidentiality or other purposes
- Conversion of DOC files to PDF

**MY COMPANY LOGO**

Date:	01-06-2021
Our Ref.:	QUOTE-6
Your Ref.:	
# Account:	Netflix
Country:	United States
Sales:	Administrator
Type:	
Validity ending date:	30 days

**QUOTATION**

To: Netflix  
Address: Los Gatos, United States

End User:  
Project:

No	Model	Description	Unit Price USD	Qty	Disc	Amount USD
1		Audio content	280.00	1		280.00
2		Video Material production	5600.00	2	5%	10840.00

**SUMMARY**

Sub-Total		10900.00
VAT		0.00
Grand Total	USD	10900.00

**Notes**

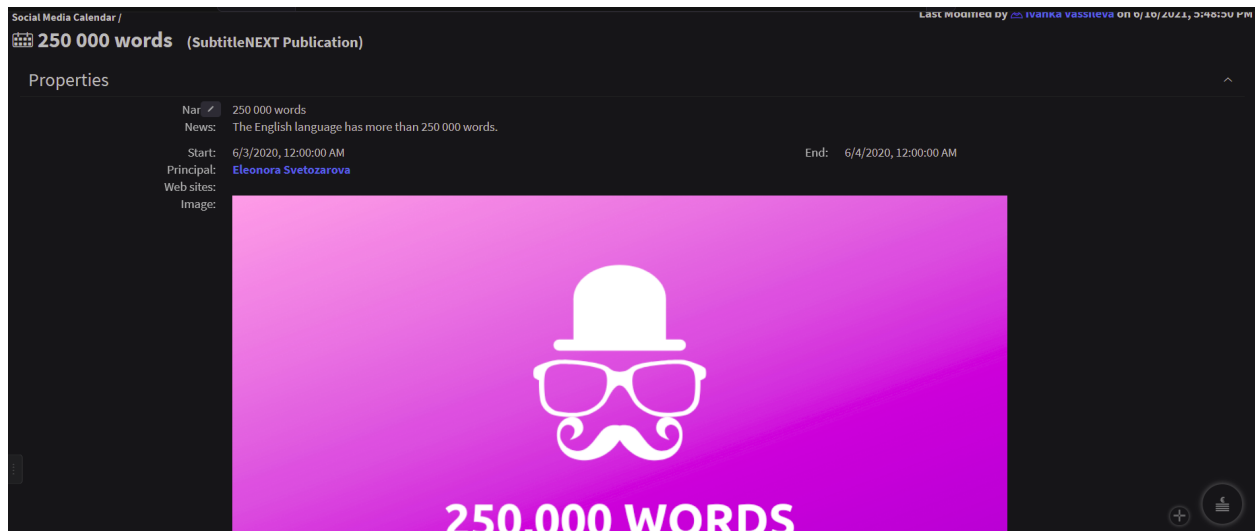
- RESERVES THE RIGHT TO CHANGE CONFIGURATIONS AND COMPONENTS WITHOUT NOTICE.
- Prices and Delivery Terms:
  - Delivery to be determined at time of order; Generally 2-4 weeks.
  - Payment Terms: 50% Advance

## Marketing Management

### Event Management

- Plan, categorize and manage events such as trade shows
- Daily, weekly, monthly, and quarterly views and filtering based on multiple criteria such as start date/time, end date/time, location, type of audience, etc.
- Default fields include Event Name, Location, Start Date, End Date, Budget, Person in Charge, Event Audience, Status and Related Activities such as business trips
- Track all resources, e.g. reservations and attachments.





## Social Media Management

- Plan, categorize and manage social media channels and schedules
- Daily, weekly, monthly, and quarterly views and filtering based on multiple criteria
- Default fields include Social Media Channel, News Text, News Images, News Videos, Publishing Date and Time, Person in Charge, Approval Status, and Publishing Status
- Activity log, Change Log, Live Collaboration through comments

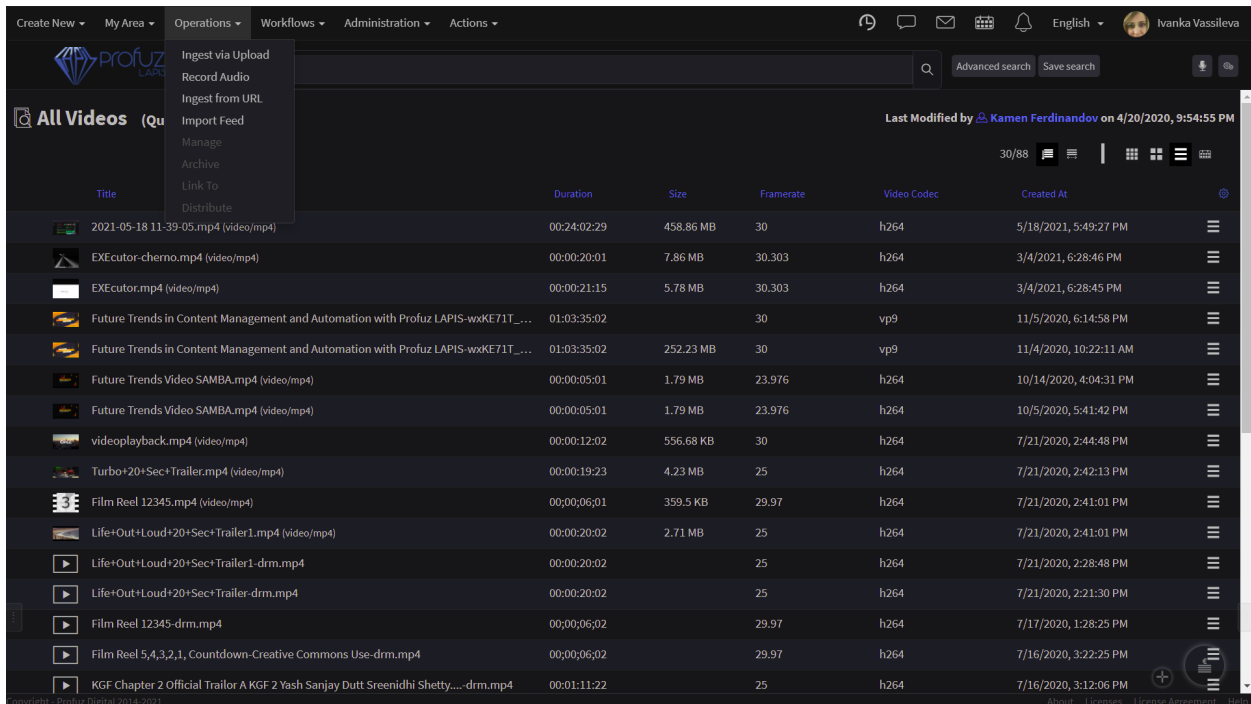
## Email Campaigns Management

- Manage and track Subscribe/Unsubscribe activities from sources such as newsletters, product announcements, promotions or overall e-mail marketing
- Add / Remove subscription criteria and monitoring parameters
- Import / Export contacts for email marketing programs or automatic synchronization with a client-preferred email campaign management tools such as Mailchimp, SendinBlue, etc.

## Digital Content Management

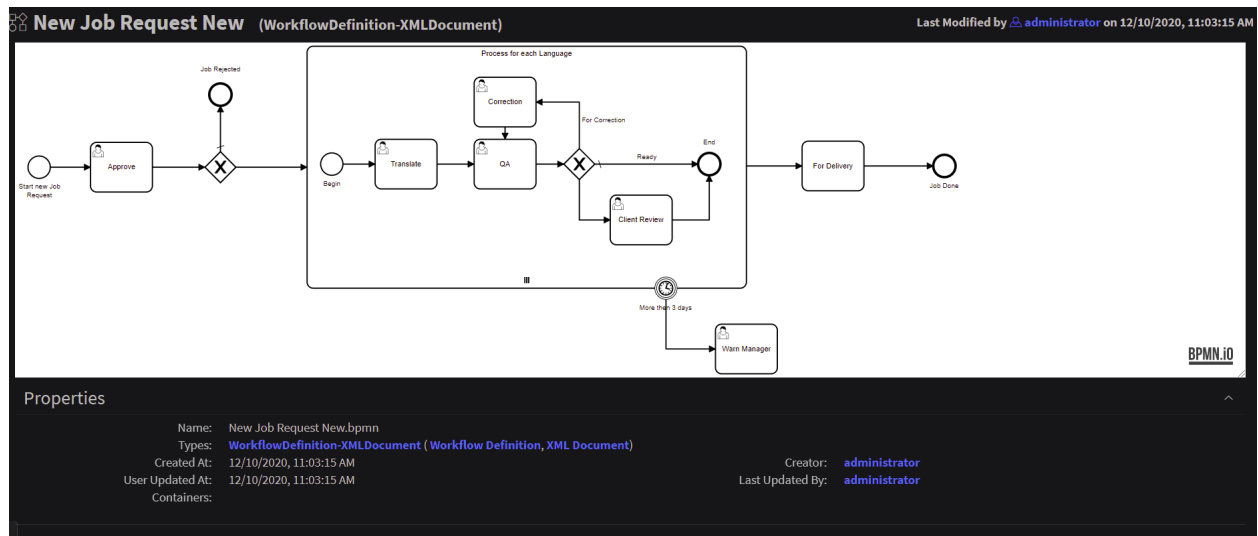
- Plan, assign, preview, simple edit, approve, and publish audiovisual materials
- Supported content includes video, audio, images, graphics, diagrams, tables, charts, documents, and more

- Content directly available for collaboration
- Watermarking and encryption of audiovisual materials
- Regulated download based on user rights
- Access to contents available in connected cloud storages such as WebDav, DropBox, Azure Cloud or on FTP/S
- Protected sharing of audiovisual content with subcontractors and controlled collaborative work through chats, comments, projects, tasks, folders, etc.



## Workflow Management

- Creation and editing of workflows with the built-in workflow editor
- Import of BPMN workflows
- Start workflow operation
- Always active workflow instances
- Mixing of automatic processes and user-driven workflows in a single process
- Simple and complex workflows
- Unlimited number of running workflow instances
- Monitoring of all the active workflow processes by the managers and administrators of the system

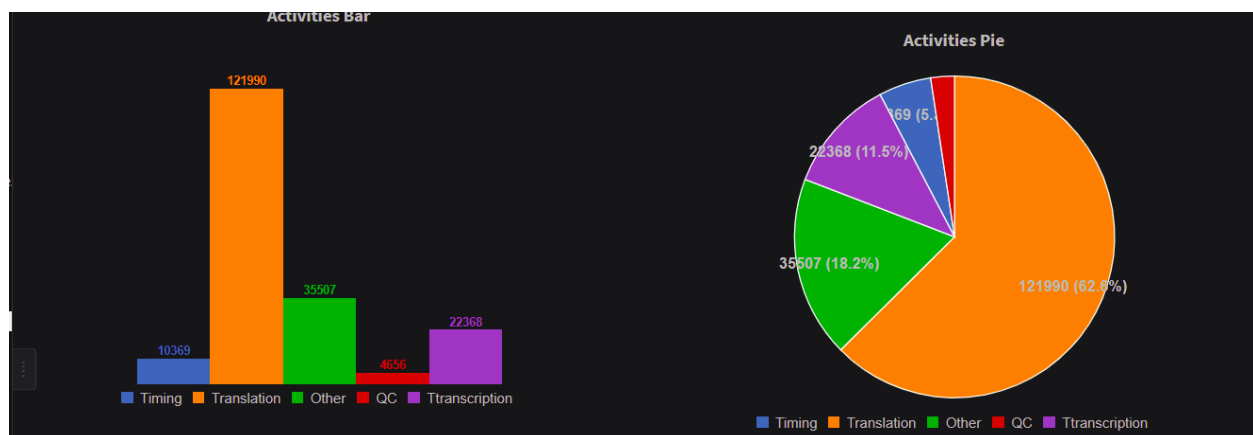


## Third-party Integrations

Profuz LAPIS makes possible the integration of numerous online or offline, internal or external systems. Many such systems are integrated “out-of-the-box”, and others can be implemented per client-specific requirements.

## Platform Look and Branding

Multiple Themes, User Layouts and Templates available. Possibility for UI customizations per user groups, individual users or client company overall branding.



# What benefits does Profuz LAPIS bring to your business?

- Unified environment for your business grow
- Effective sales and marketing management
- Minimal risk for human errors
- Visibility on users actions
- Controlled access to information and other company resources
- Protection and security of company data
- Easy collaboration and teamwork
- Quick and easy access to useful information in real time
- Informed decision making
- Improved return on investments
- Mobility and remote work
- Consistency of the company branding

## About Profuz Digital

Profuz Digital is a modern IT company with RND center in Sofia, Bulgaria and business partners all around the world. With 20+ years of expertise in data processing, business process automations and software system integrations for various industries, Profuz Digital is an experienced technology startup whose purpose is to provide to the market powerful, but affordable and easy to integrate software solutions for optimizing workflows and contents. Our goal is to continually deliver simpler and easier ways for the companies to exceed their business goals. That's why and how we have designed our core software platform Profuz LAPIS.

More about Profuz Digital:

[www.profuzdigital.com](http://www.profuzdigital.com)

[www.profuzlapis.com](http://www.profuzlapis.com)