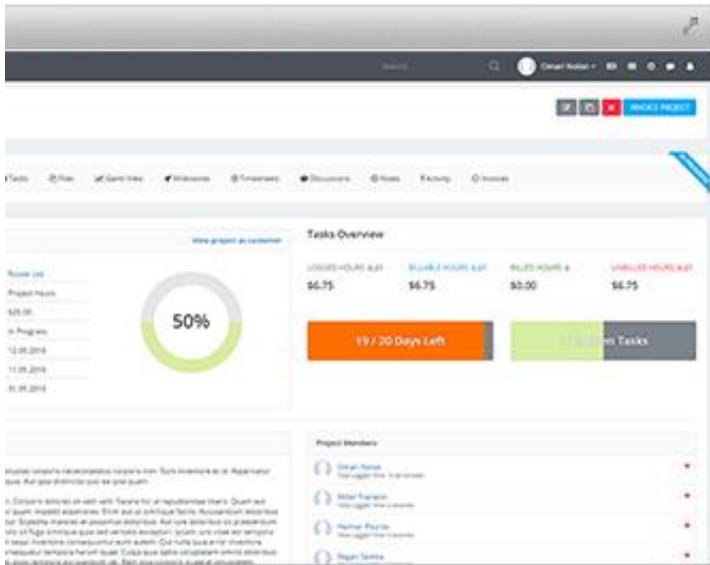BEK CRM is complete Customer Relationship Management software that is a great fit for almost any company or many other uses. With its clean and modern design, BEK CRM can help you look more professional to your customers and help improve business performance at the same time.

PROJECTS

Manage and invoice projects with the powerful Project Management feature

Track time spent on tasks and bill your customers. Ability to assign multiple staff members on task and track timer per assigned staff.
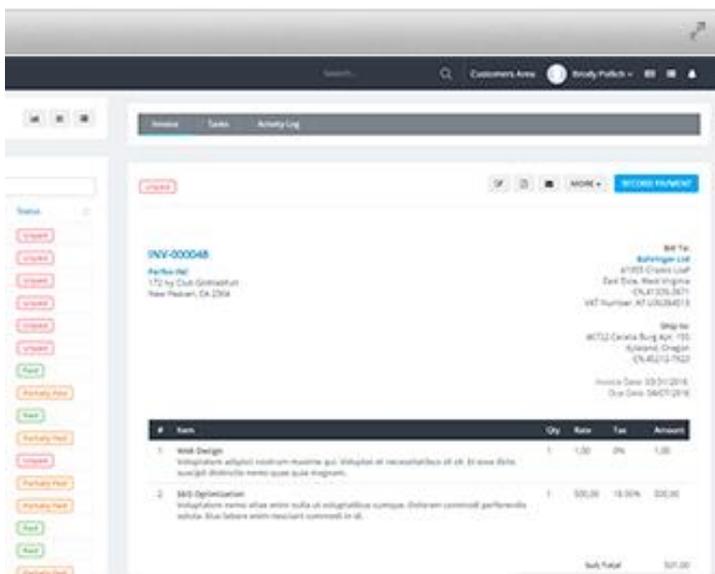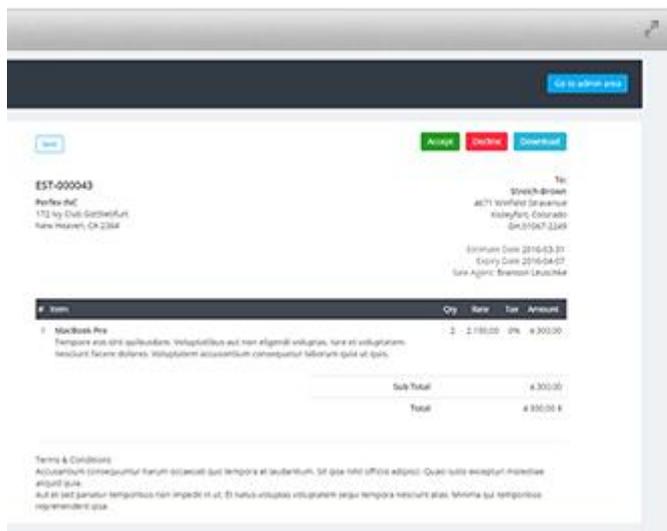
INVOICES

Build professional and great looking invoices. Attach files and send directly to your clients including the invoice PDF.

Ability to setup recuring invoices

Managing customers is important and BEK CRM helps in several ways:

- Manage and invoice projects with the powerful Project Management Feature.
- Link tasks to many BEK CRM features and stay organized.
- Build professional, great looking estimates and invoices.
- Powerful support system with ability to auto import tickets.
- Track time spent on tasks and bill your customers. Ability to assign multiple staff members on task and track timer per assigned staff.
- Add task followers even if the staff is not project member. The staff member will be able to track the task progress without accessing the project.
- Keep track of leads in one place and easily follow their progress. Ability to auto import leads from email, add notes, create proposals. Organize your leads in stages and change stages easily with drag and drop.
- Create good looking proposals for leads or customers and increase sales.
- Records your company/project expenses and have the ability to bill to your customers and auto convert to invoice.
- Know more about your customers with powerful CRM.
- Increase customer retention via built-in Surveys.
- Use the Goals Tracking feature to keep sales goals in mind.
- Create announcements for your staff members and customers.
- Use Contracts feature to lock in current and future sales.
- Custom fields can store extra information for customers, leads and more.
- Receive payments from Paypal and Stripe in different currencies.
- Tons of configurable options.
- Separated media folder for non-admin staff members to work inside the CRM and organize their uploads and files.
- Great looking calendar for each staff member based on staff permissions.
- Follow ups, reports, notes, files and many more features.
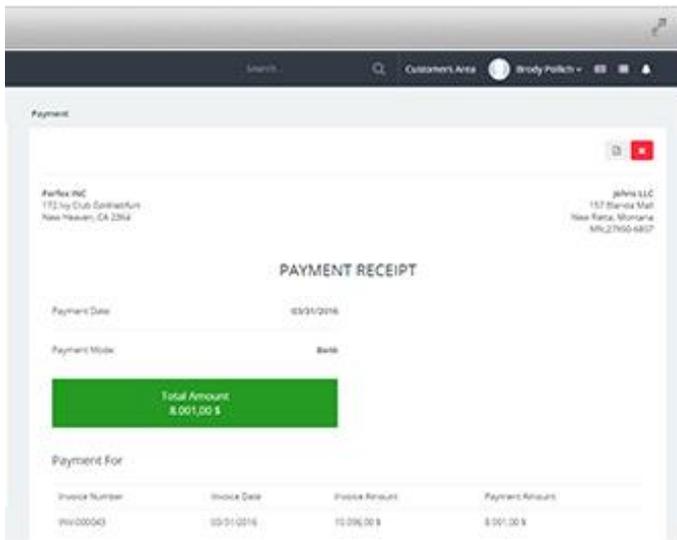

ESTIMATES

Create estimate within a minute. Sent to your customers and wait to accept.
Ability to auto convert the estimate to invoice after customer accept. You customers can view and make actions the estimate even without login.
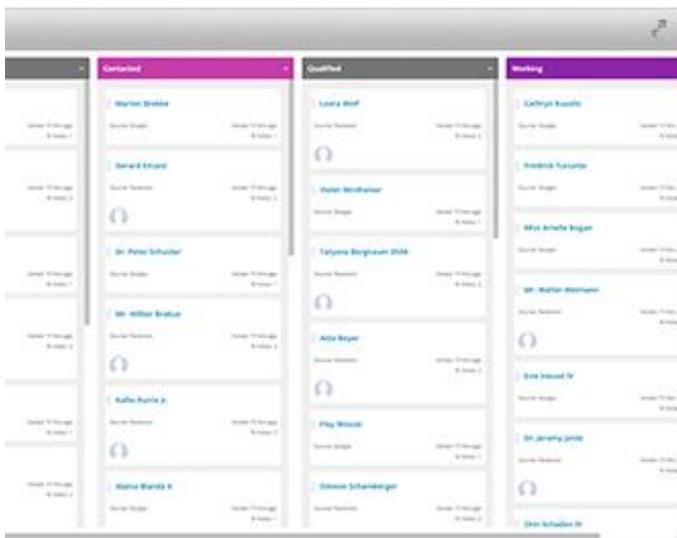
PAYMENTS

Record and receive payments in different curencies.

Auto generated PDF send to the customer.

LEADS MANAGEMENT

With the simple Kan Ban you can keep track of leads and easily follow their progress.

Attach files, convert lead to customer, track leads from email, create proposals, leave notes.

CRMs need to focus on customers and BEK CRM does that with a powerful support system that helps you track and resolve issues quickly via the integrated ticket system and customer reminders. Assign reminders to yourself, one or many staff members and with one click, reminders can be sent to email and in-app notification system. These features and more can take customer satisfaction to the next level. BEK CRM has many features designed to fit many applications.
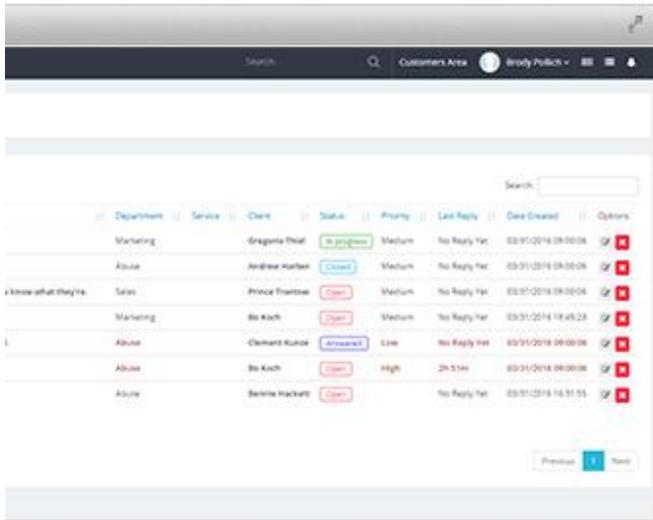
SUPPORT SYSTEM

Great Support system that helps you track and resolve issues quickly with ability for auto open ticket from email, insert knowledge base link, add pre-defined replies.
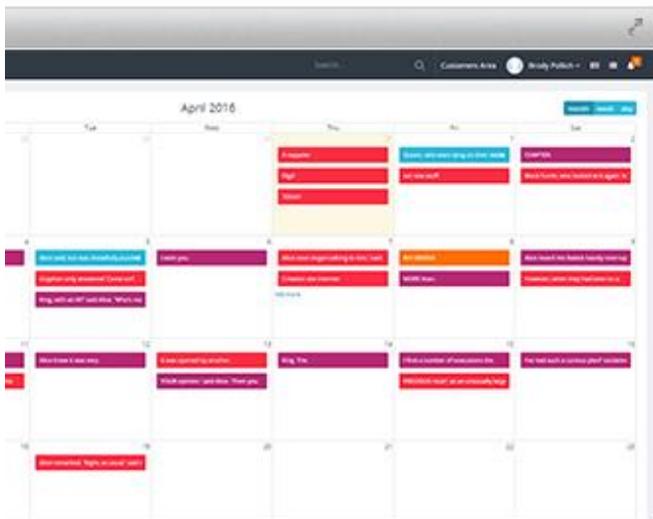
CALENDAR

Have clear view of all your company events, upcoming invoice payments, contracts expiration, estimate expiration, tasks finish date, reminders.

You'll never miss anything from the calendar.

Customers

Easily manage your customers and their contacts, create multiple contacts for your customers and set proper permissions. Customers area is fully separated from the admin area. Clients have their own client portal with all financial data from your company presented in clear view. Set customer reminders Never forget anything about your customers.

TASKS

Assign task to multiple staff members, add followers, attach files.

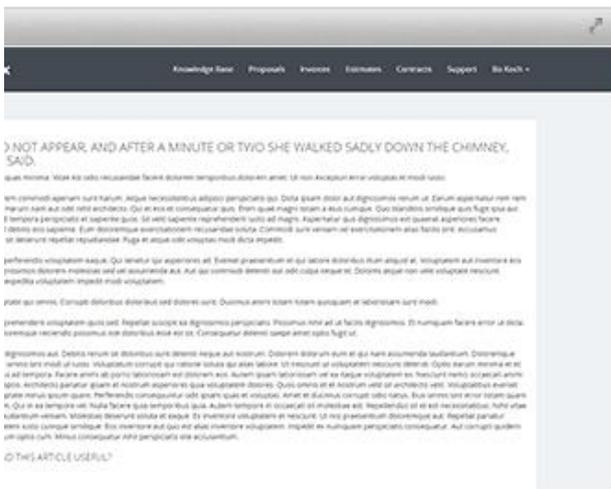Let your staff comment on tasks, upload files

Tasks can be related to mostly all important features.
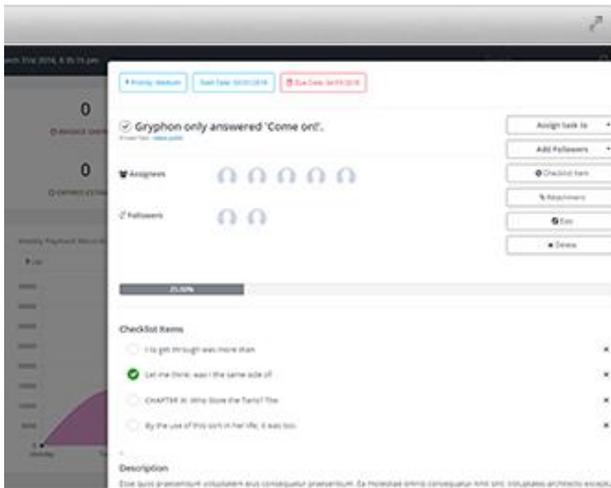
KNOWLEDGE BASE

Create knowledge base articles and organize them in groups.
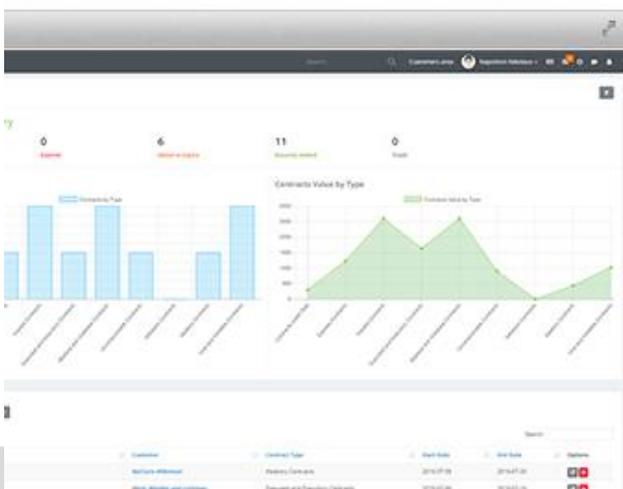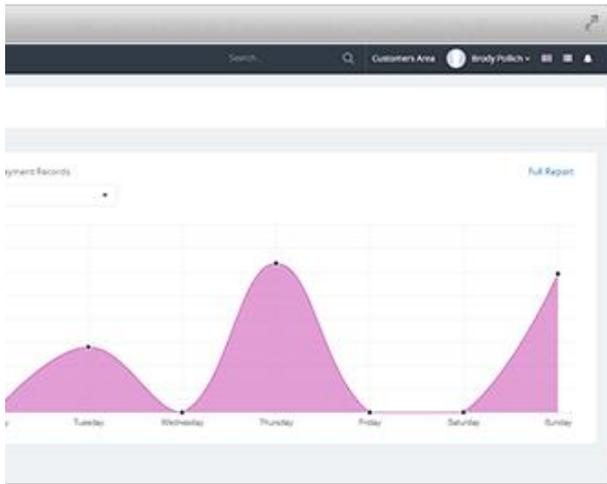
Help your customers and build trust.

CONTRACTS

Use Contracts feature to lock in current and future sales.

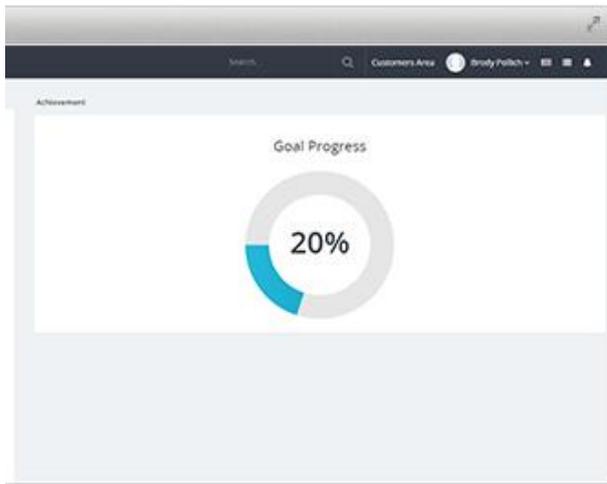Easily create contract PDF and send the contract directly to the customer email.

REPORTS

Generate reports and have clear view of everything. Keep track income vs expenses and leads conversions.
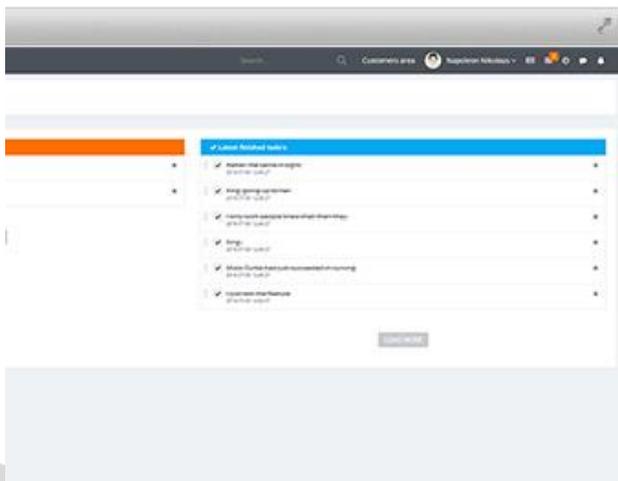
Knowledge base report included.

GOALS TRACKING

Use the Goals Tracking feature to keep sales goals in mind.

Ability to notify staff members about failure or success.

PERSONAL TODO LIST

Each staff member have their own personal todo items board to increase productivity.

Easily change todo status by the drag and drop feature enabled.

Invoices

BEK CRM allows you to keep in track your invoices, items and generate reports. Add new currencies, using multiple currencies is allowed by previously setup customer currency. Invoice with different tax based on item.

Recurring Invoices

Create recurring invoices that will be regenerated automatically based on your setup for recurring invoice (every X months). You can set recurring starting from 1 month to 12 months.

Recurring Expenses

Creating recurring expenses. Set up a recurring expense and the expense will automatically be created after the specified period. The period time could be days, weeks, months or years

Estimates

Create estimate within a minute, sent to your customers and wait to accept, add notes for better organization for your next actions, create reminders. Ability to auto convert the estimate to invoice after customer accept.

Proposals

Create good looking proposals for leads or customers and increase sales. Receive notification when proposal is accepted/declined and auto sent thank you email to your customer after accepting the proposal. Proposal overdue notice before X days available.

Online Payments

Receive payments from Paypal and Stripe in different currencies.

Projects

Manage projects and track time spent on project for each staff member. Record project expenses and invoices and bill your clients faster. Professional Gantt Chart included for each project and staff member.

Milestones

Create milestones for projects and track time spend based on milestone. Ability to Drag and Drop tasks between milestones.

Leads

Leads or potential clients are really important part to any company. Every company trying everyday to get new leads. Very offen happend some potential client to call and ask for specific service that you company serve and then sometimes this is fogotten. With BEK CRM you will never forget your potential clients and you will be able to manage all of them in one place. Keep track of leads in one place and easily follow their progress. Ability to auto import leads from email, add notes, create proposals. Organize your leads in stages and change stages easily with drag and drop.. Ability to auto import leads from emails and import leads from .CSV file included.

Contracts

You can add new contracts based on your clients. Adding contracts is very simple, you can set start date and end date and have clear view of all your company contracts in one place. You wont need anymore to search in your desk documents. Create PDF contracts and send to your customers from BEK CRM. Contract overdue reminders available.

Tickets

Great support ticket system with autoresponse. Private ticket staff notes, ticket assignments, attachments, predefined ticket replies, insert knowledge base link, ticket priorities, ticket statuses.

Departments

Assign your staff to specific departments and ability to auto import tickets by department email.

Custom Fields

Custom fields can store extra information for customers, leads, tickets, invoices, comapany, estimates and more.

BEK Group Service
Beethovenstr. 2
D-87435 Kempten (Allgäu)

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UStID-Nummer: DE296463932
Finanzamt Kempten (Allgäu)

Tel. +49 831 92879051
F. +49 831 53057991
E. info@bekgroup.de
w. www.bekgroup.de

Staff Reminders

Setup staff reminders for staff member with ability to notify by email and built-in. Reminders are available for important features.

Events

Create private or public events. Receive notification when an event is coming built-in and email.

Email Templates

Setup predefined email templates from text editor. Merge fields available.

Staff Roles & Permissions

You can give staff a specific permissions what can do or cant do. Role permissions can be overided for each staff.

Goals Tracking

Setup goals and tracking achievements. Use the Goals Tracking feature to keep sales goals in mind.

Personal todo items

Every staff member can have their own personal todo dashboard.

Staff

Manage all your staff members from one place.

Company Newsfeed

Share great company events, upload documents, easy employees communications.

Staff Tasks

Assign task to multiple employees, add task followers, task comments allowed, task attachments. Link tasks to many BEK CRM features and stay organized.

Recurring Tasks

Create tasks that will be auto created for a given time.

Surveys

Create surveys with one click. Send to staff,leads, clients or manually created mail lists. Increase customer retention via built-in Surveys.

Reports

Reports
Sales
Expenses Report
Reports by customer
Custom date picker
Leads Conversions
Knowledge base articles (Track if your article is usefull to clients, improve text based on votes)

Knowledge Base

Add knowledge base articles from text editor. "Did you find this article useful?" vote included in clients area.

Media Library

Upload files in media library. Each staff member that is not admin have their own folder for uploading files.
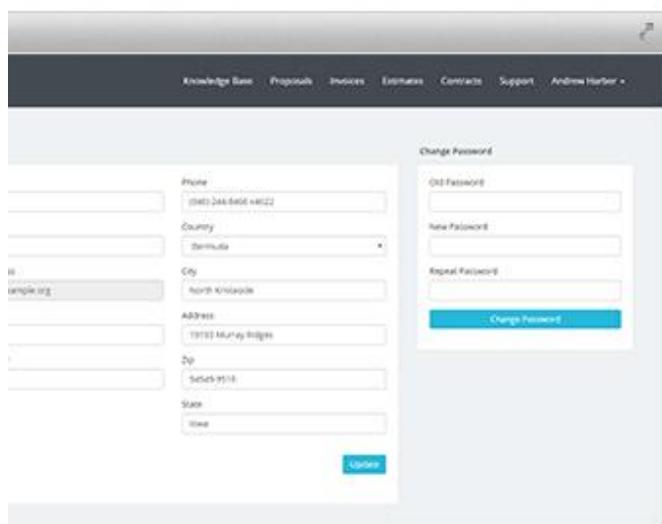
CUSTOMERS AREA

The customers area is fully separated from the admin area.

Eech customer have their own portal where can kep track from all financial data from your company.

Create Good Looking Proposals

CREATE PROPOSAL FOR LEADS OR CUSTOMERS

Send Estimates to Customers

ABILITY TO CREATE ESTIMATES AND AUTO CONVERT TO INVOICE AFTER ACCEPTING

BEK Group Service
Beethovenstr. 2
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Sensitive data is encrypted

BEK CRM encrypts all sensitive data in the database with unique encryption key. Encryption performed on email passwords, api keys, api passwords etc..

Server Side Datatables

BEK CRM is using serverside datatables to perfectly handle large databases.

Responsive

BEK is fully responsive. You can easily access your data from mobile or tablet.

Activity Log

Track all staff activity. Adding new items, creating, deleting.