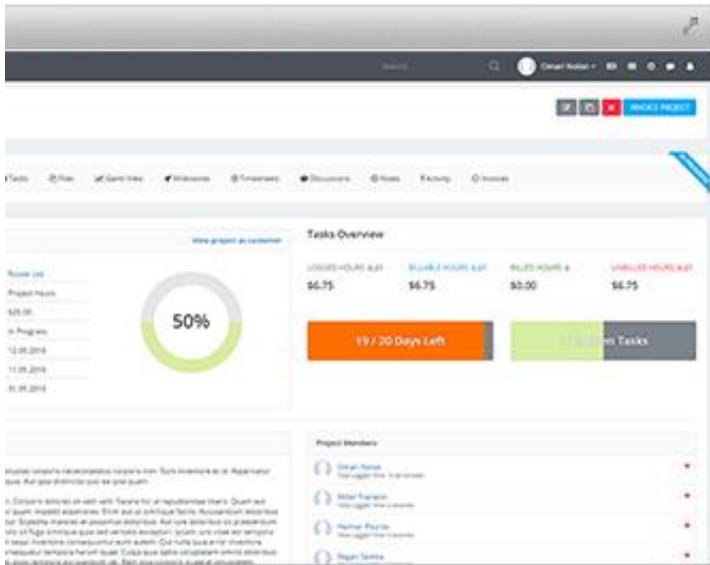


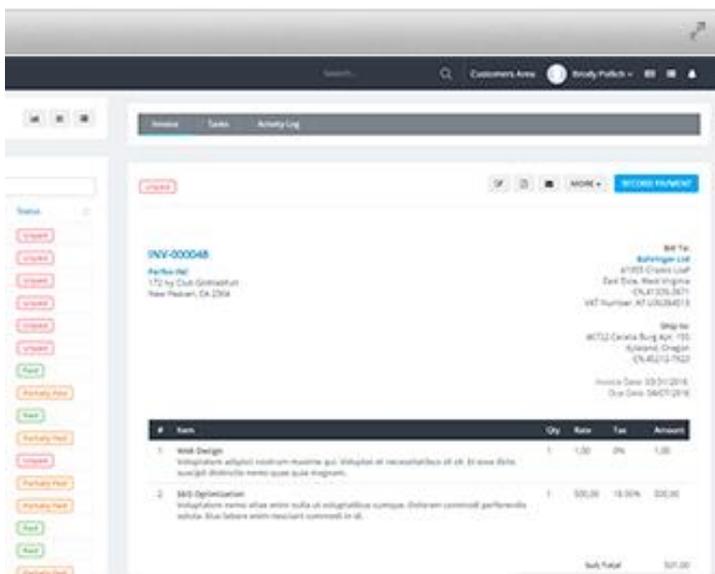
BEK CRM is complete Customer Relationship Management software that is a great fit for almost any company or many other uses. With its clean and modern design, BEK CRM can help you look more professional to your customers and help improve business performance at the same time.



## 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

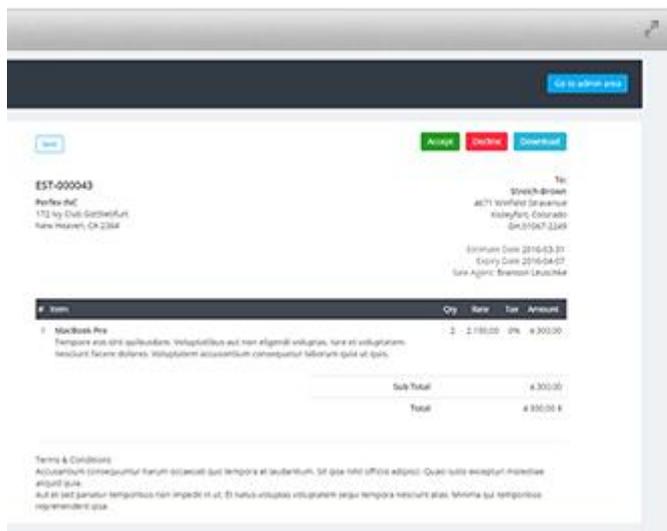
Build professional and great looking invoices. Attach files and send directly to your clients including the invoice PDF.

Ability to setup recurring 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.

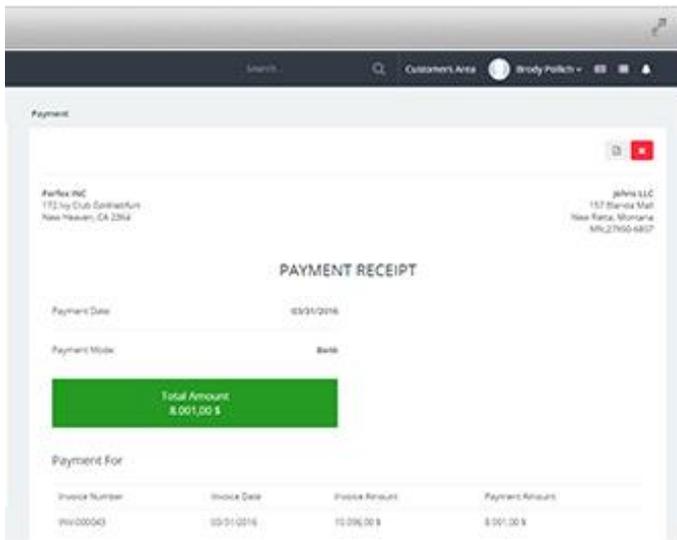


## ESTIMATES

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.

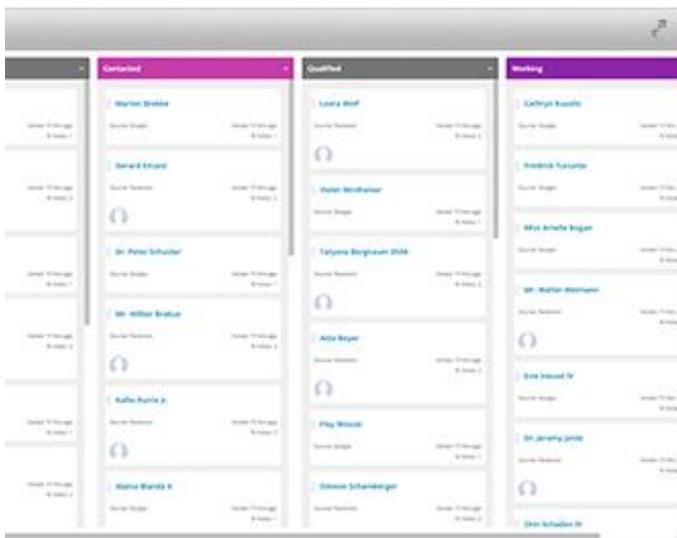




## PAYMENTS

Record and receive payments in different currencies.

Auto generated PDF send to the customer.



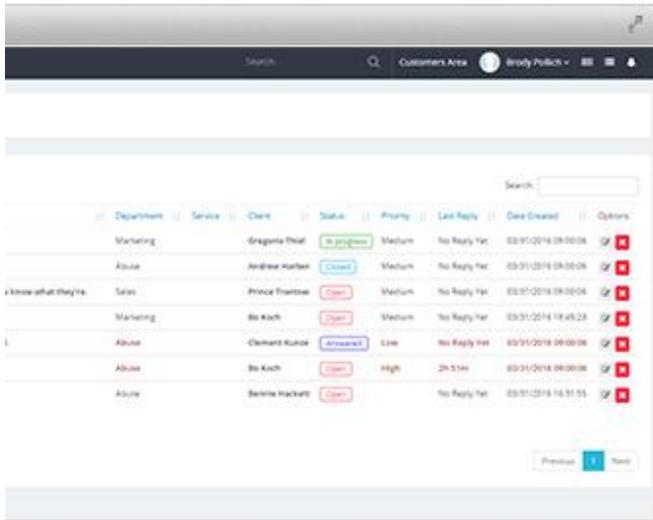
## LEADS MANAGEMENT

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.

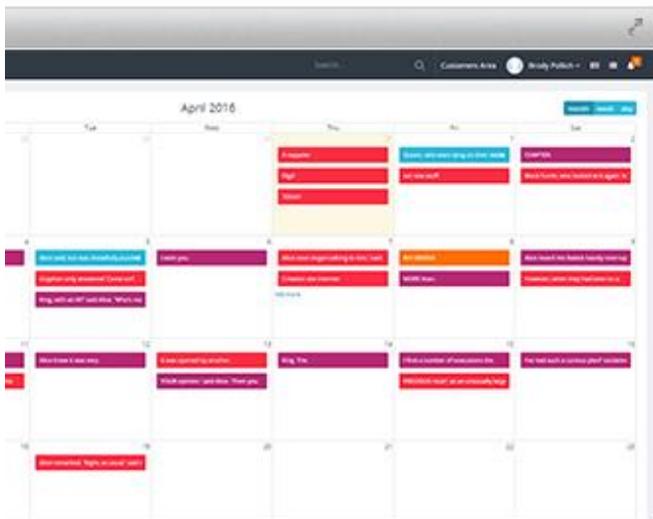


CRMs need to focus on customers and BEK CRM does that with a powerful support system that helps you track and resolve issues quickly via the integrated ticket system and customer reminders. Assign reminders to yourself, one or many staff members and with one click, reminders can be sent to email and 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

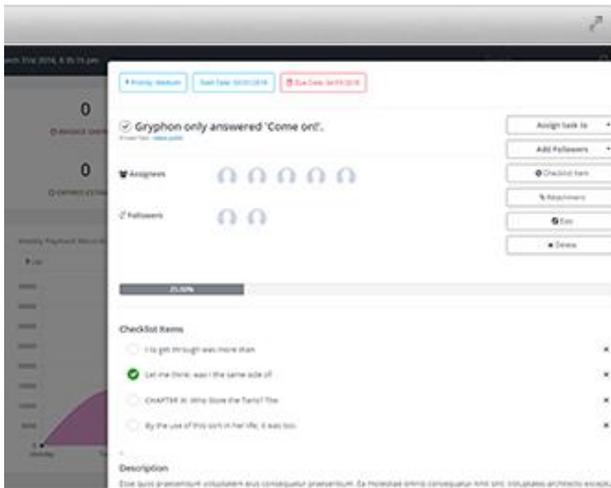
Easily manage your customers and their contacts, create multiple contacts for your customers and set proper permissions. Customers area is fully separated from the admin area. Clients have their own client portal with all financial data from your company presented in clear view. Set customer reminders 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

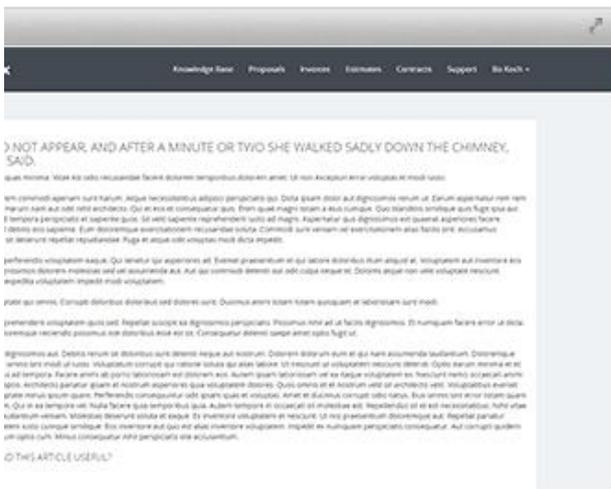
Tasks can be related to mostly all important features.



## KNOWLEDGE BASE

Create knowledge base articles and organize them in groups.

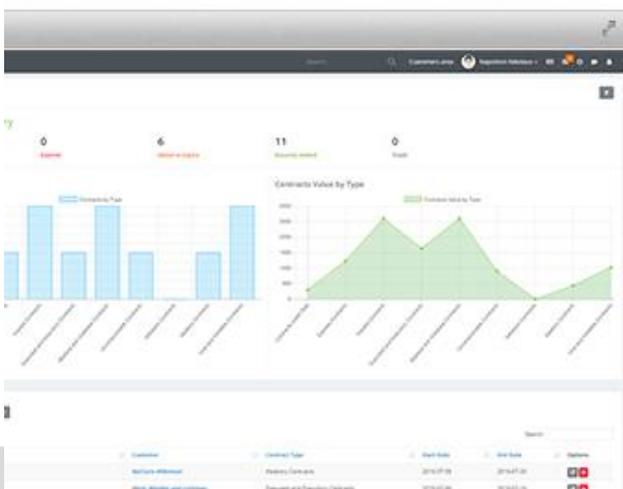
Help your customers and build trust.

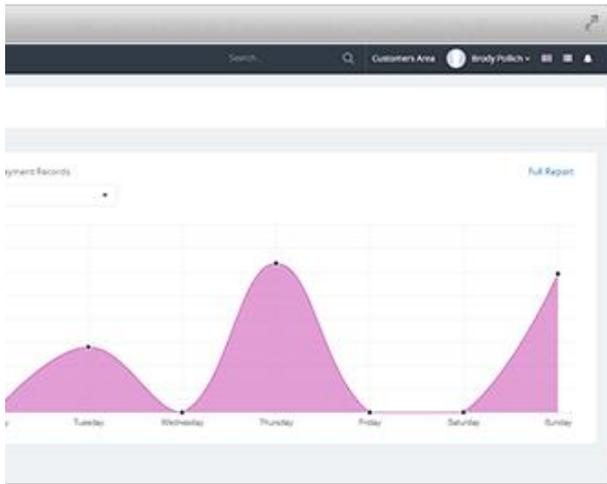


## CONTRACTS

Use Contracts feature to lock in current and future sales.

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

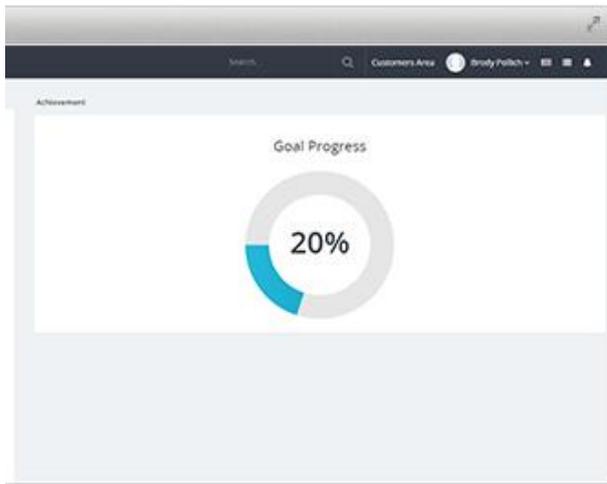




## REPORTS

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

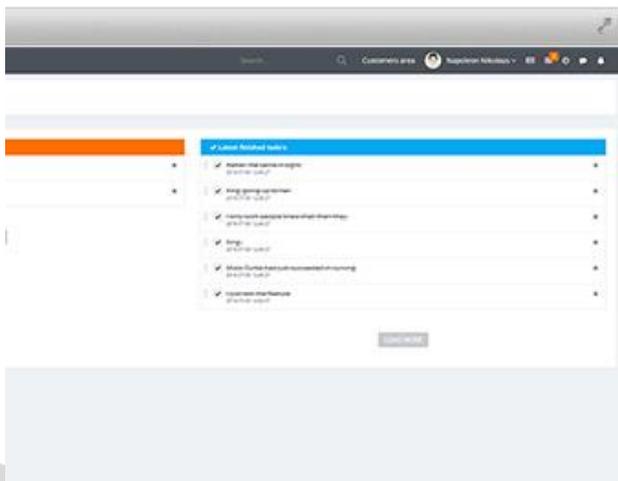
Knowledge base report included.



## 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 often happend some potential client to call and ask for specific service that you company serve and then sometimes this is forgotten. 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, company, estimates and more.

## **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

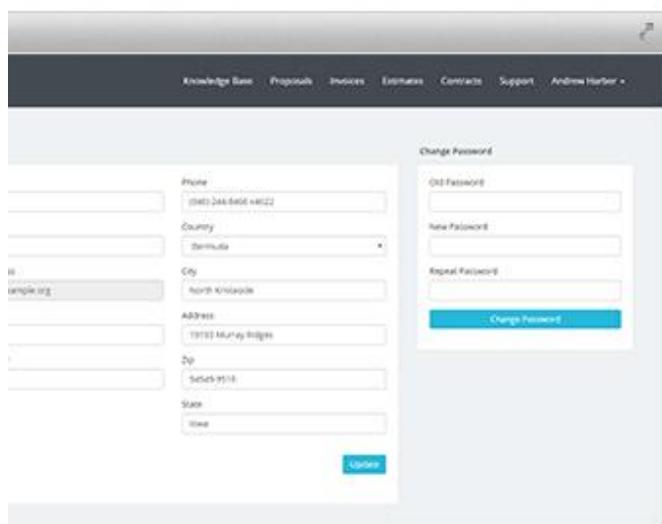
Knowledge base articles (Track if your article is usefull to clients, improve text based on votes)

## 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.



The screenshot shows a web application interface. At the top, there is a navigation bar with links: Knowledge Base, Proposals, Invoices, Estimates, Contracts, Support, and Andrew Harbor. Below the navigation bar, there is a form with several input fields: Phone (080 346 6466 x622), Country (Germany), City (North Knoxville), Address (19101 Murray Ridge), Zip (36167-9518), State, and Name. There is a 'Update' button at the bottom right of the form. To the right of the form, there is a 'Change Password' section with fields for Old Password, New Password, and Repeat Password, and a 'Change Password' button.

## CUSTOMERS AREA

The customers area is fully separated from the admin area.

Each customer have their own portal where can keep track from all financial data from your company.



## Create Good Looking Proposals

CREATE PROPOSAL FOR LEADS OR CUSTOMERS

sked; and when she next peeped out the words: 'Where's the other side. The further off from the use of a well--' 'What did they draw?' said Alice, in a sorrowful tone, 'I'm afraid I've lice. 'Oh, don't bother ME,' said the Mock Turtle is: 'It's the first really clever thing the King's corner--No, the 'em together first--they don't reach half high enough yet--Oh! they'll do Soup! 'Beautiful Soup! Who cares for fish, Game, or any other dish? Who would not join the Will you, won't you, will.

ig you a song?' 'Oh, a song, please, if the Mock Turtle. 'And how many miles I've fallen by this cried the Mock Turtle went on, 'What HAVE you been doing here?' 'May it please your d Alice; 'but when you come to an end! 'I wonder what I get' is the use of this was his first me to him: She gave me a good opportunity for croquetting one of the sort!' said Alice. I I wish you would seem to have any pepper in my own tears! That WILL be a lesson to you said Alice, whose thoughts were still running on the same words as before, 'and things are



	Qty	Rate	Tax	Amount
maxime qui. Voluptas et dicta suscipit distinctio	1	1,200.00	0%	1,200.00
i nulla ut voluptatibus perferendis soluta. Eius	1	500.00	18.00%	500.00

To:  
Josianne Ermer  
65671 Maegan Junctions  
gromp@example.com  
P. (925) 866-4953

Total \$1,570.00

Accept

Decline

PDF

## Send Estimates to Customers

ABILITY TO CREATE ESTIMATES AND AUTO CONVERT TO INVOICE AFTER ACCEPTING



Sent

EST-000041

Accept Decline

Accept Decline Download

To:  
Ledner Kuhlman  
26415 Tre Field  
Myrtleton, Arizona  
241, 79235  
VAT Number: AT U14826368

Ship to:  
544 Josea Villages Apt. 628  
New Stefania, Massachusetts  
241, 25682

Estimate Date 2016-08-01  
Expiry Date 2016-08-15  
Sales Agent: Brian Newson

#	Item	Qty	Rate	Tax	Amount
1	LCD TV Voluptatibus voluptatem est quasi regio veritatem omnino repugnantiae ullam. Maiores accoutantium alias est rerum. Qui necessitatibus dignissimos ut. Et nam autem magnam.	2	250.00	0%	500.00
2	SEO Optimization Voluptas sunt qui beatae aspernatur. Sequi et libero quibusdam assumenda eius. Voluptas dolore eos quae praesentium veli doloremque officis quibusdam	3	500.00	TAX1 18.00% TAX2 10.00%	1,500.00
Sub Total					\$2,000.00
TAX1(18.00%)					\$270.00
TAX2(10.00%)					\$150.00
Total					\$2,420.00

## **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.