



# PERFECTO<sup>®</sup>

Customer Relationship Management

Manage Customers   Manage Team   Manage Projects

HAKSOFT DIGITAL SOFTWARE TECHNOLOGIES LTD.



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

## Innovative Business Solutions with Artificial Intelligence: PerfectoCRM

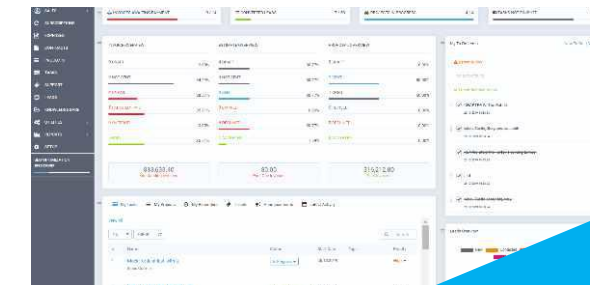
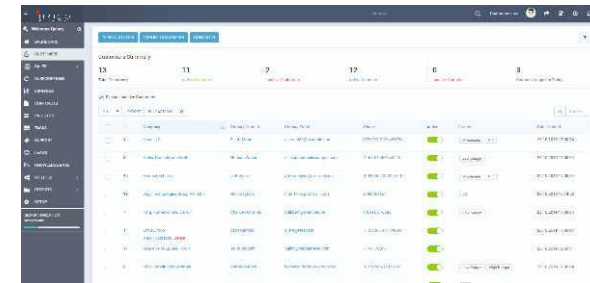
Adapting to the rapidly changing dynamics of the business world and gaining a competitive advantage is now easier than ever! PerfectoCRM is a state-of-the-art Cloud Software solution designed to enhance business efficiency, strengthen customer relationships, optimize operations, and integrate artificial intelligence applications.

PerfectoCRM stands out with its comprehensive and flexible features. By making your business processes smarter, you can save time and resources. Thanks to data analysis and reporting tools, you can make informed decisions and take strategic steps.

Offering effective solutions in areas such as customer relationship management, sales, marketing, and customer service, PerfectoCRM further enhances your business processes by integrating artificial intelligence applications and encourages communication among your teams. With its customizable interface, you can create solutions tailored to your needs and manage your business processes most efficiently.

PerfectoCRM's cloud-based infrastructure enhances accessibility while ensuring security. Its user-friendly interface allows you to adapt quickly and start using the solution effectively.

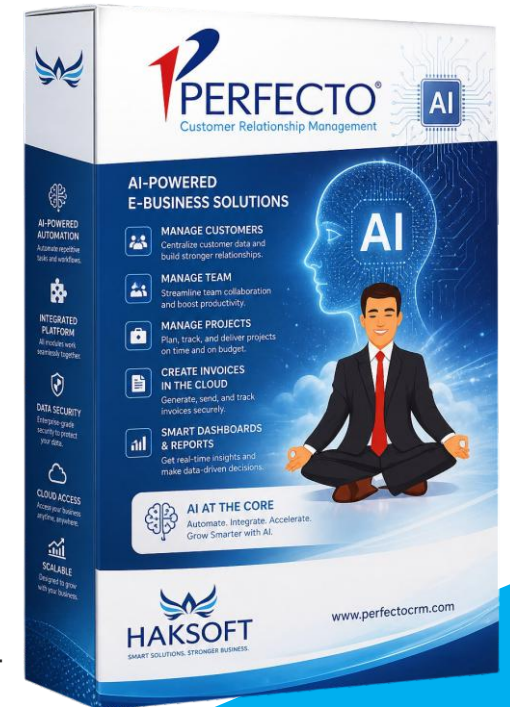
For more information, you can visit [perfectocrm.com](http://perfectocrm.com). Get to know PerfectoCRM to shape the future of your business and gain a competitive advantage!





Web  
Mobile  
Tablet

Customer Relationship Management software that is a great fit for almost any small business, freelancer or many other uses.





## MANAGE CUSTOMERS, MANAGE TEAM, MANGE PROJECTS & CREATE INVOICES IN THE CLOUD

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

**100%**

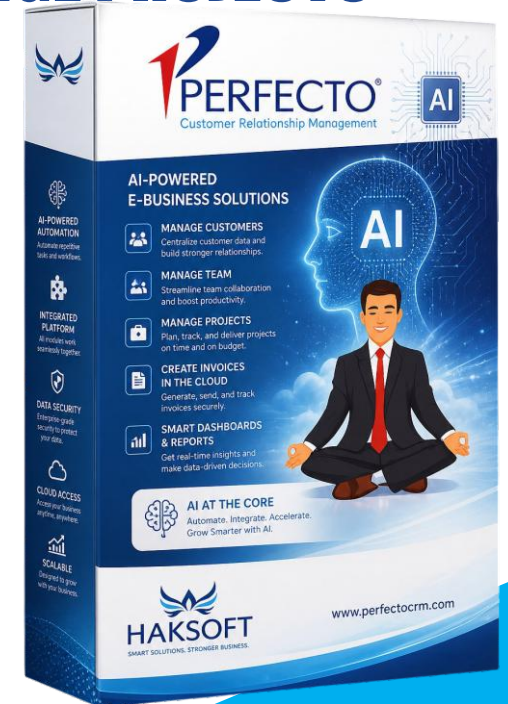
Percent of happy users using Perfecto CRM

**50+**

Projects managed with Perfecto CRM

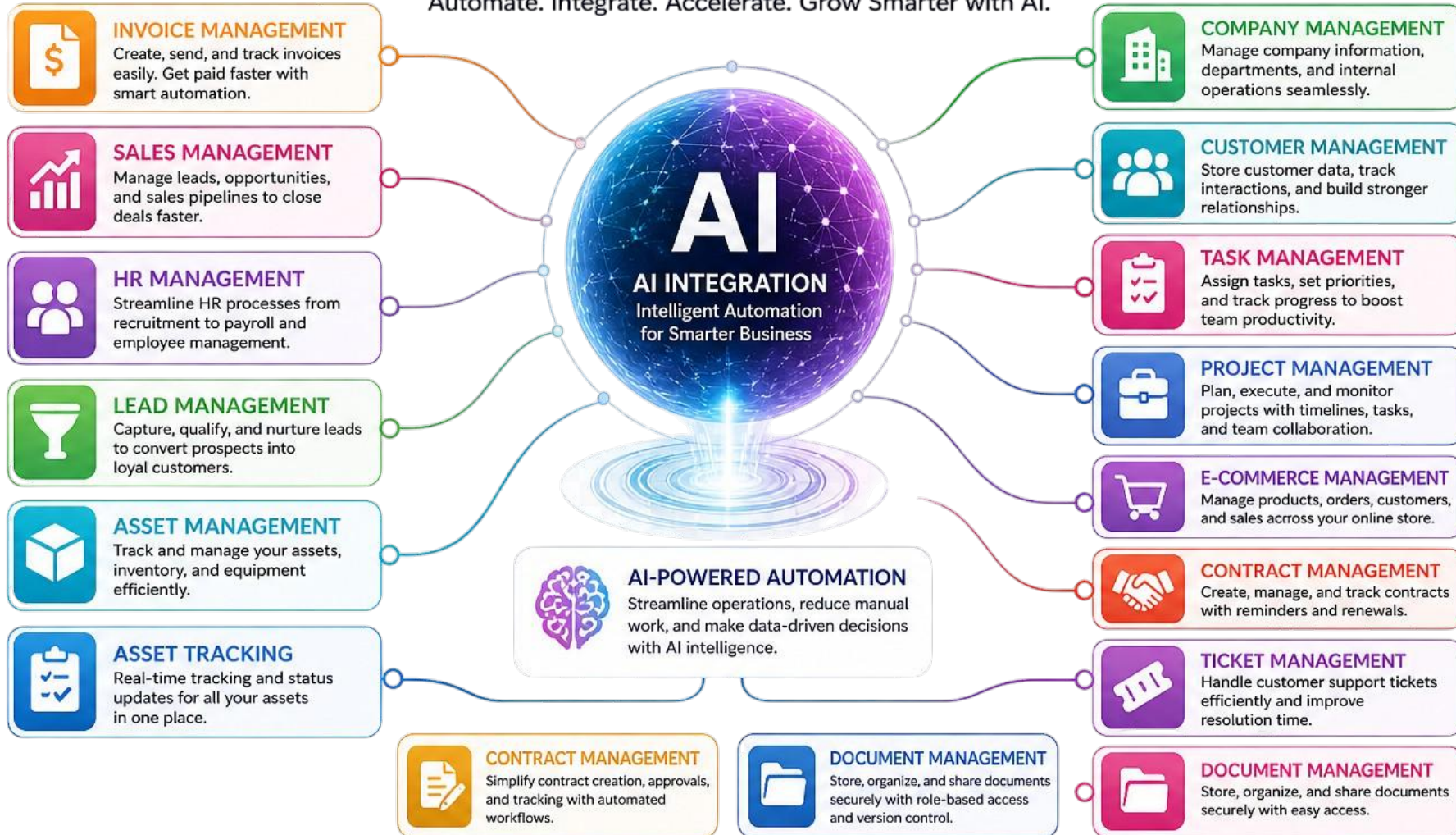
**350+**

Number of clients around the world



# All-in-One Business Solution with AI-Powered Automation

Automate. Integrate. Accelerate. Grow Smarter with AI.



-  **SMART AUTOMATION**  
Reduce manual work and save time
-  **INCREASE PRODUCTIVITY**  
Empower your team to achieve more
-  **DATA SECURITY**  
Keep your data safe and compliant
-  **REAL-TIME INSIGHTS**  
Make better decisions with real-time analytics
-  **SCALABLE GROWTH**  
Grow your business without limits

# Solution

Omnichannel Integrated One Platform

-  E-Commerce (B2C)
-  E-Commerce (B2B)
-  POS - Point of Sales
-  Mobile Sales
-  Sales Force Automation
-  Marketing Automation
-  Inventory Management
-  Purchase Management
-  HR Management
-  AI-Powered Support
-  Analytics & Reporting

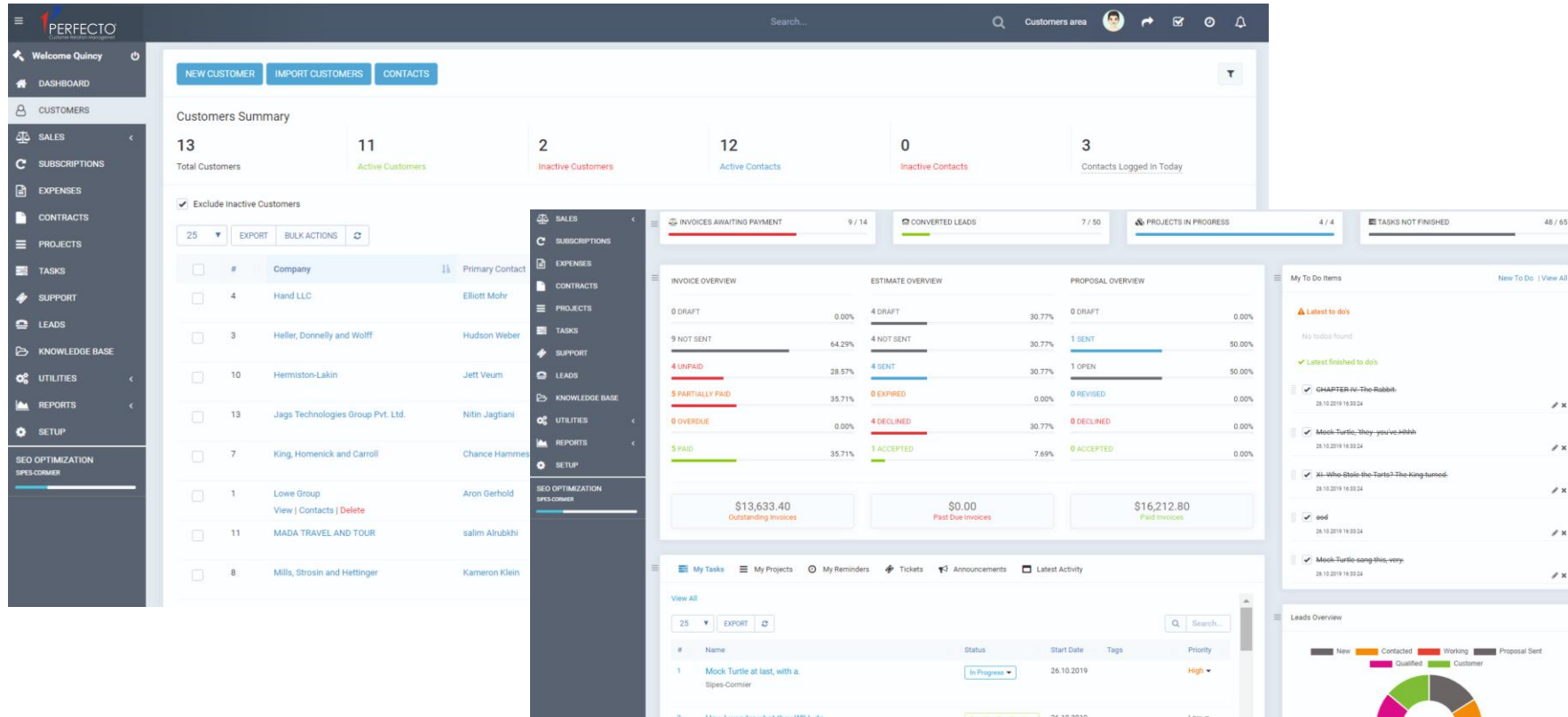
Woo  
COMMERCE  
shopify  
amazon  
ebay



 **PERFECTO**  
Customer Relationship Management

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

  
**HAKSOFT**  
"The knowledge is power"



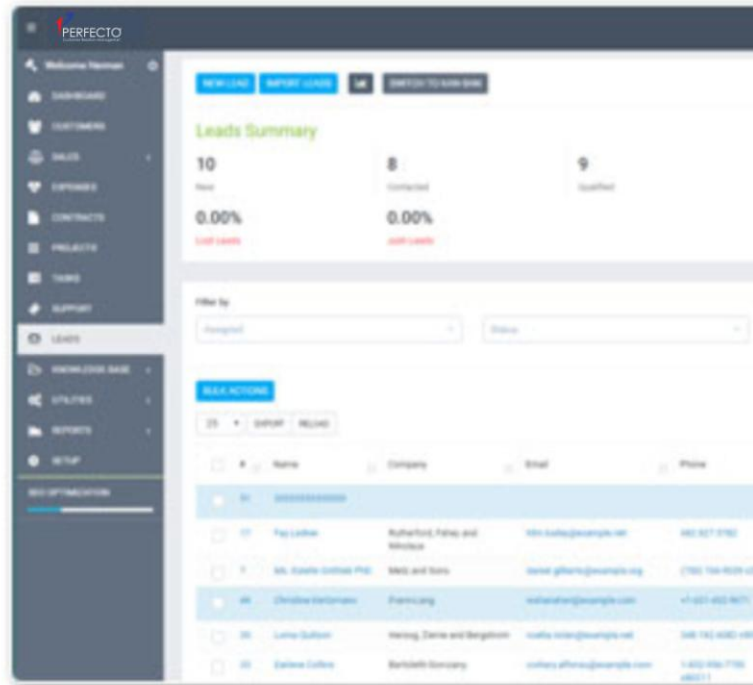
The screenshot displays the PERFECTO CRM interface. At the top, there's a navigation bar with a search field and user profile. Below it, a sidebar lists various modules like Dashboard, Customers, Sales, Subscriptions, Expenses, Contracts, Projects, Tasks, Support, Leads, Knowledge Base, Utilities, Reports, and Setup. The main content area features a 'Customers Summary' card with statistics: 13 Total Customers, 11 Active Customers, 2 Inactive Customers, 12 Active Contacts, 0 Inactive Contacts, and 3 Contacts Logged In Today. Below this is a table of customer records with columns for checkboxes, ID, Company, and Primary Contact. A secondary dashboard shows 'INVOICES AWAITING PAYMENT' (9/14), 'CONVERTED LEADS' (7/50), 'PROJECTS IN PROGRESS' (4/4), and 'TASKS NOT FINISHED' (48/65). It includes three overview charts for Invoices, Estimates, and Proposals, each with a progress bar and summary statistics. A 'My To Do Items' list is also visible, along with a 'Leads Overview' pie chart at the bottom right.





# LEADS MANAGEMENT

Keep track of leads in one place and easily follow their progress. Ability to auto import leads from email, add notes, create proposals, attach files. Organize your leads in stages and change stages easily with drag and drop.



Form Builder   Form Information & Setup   Integration Code

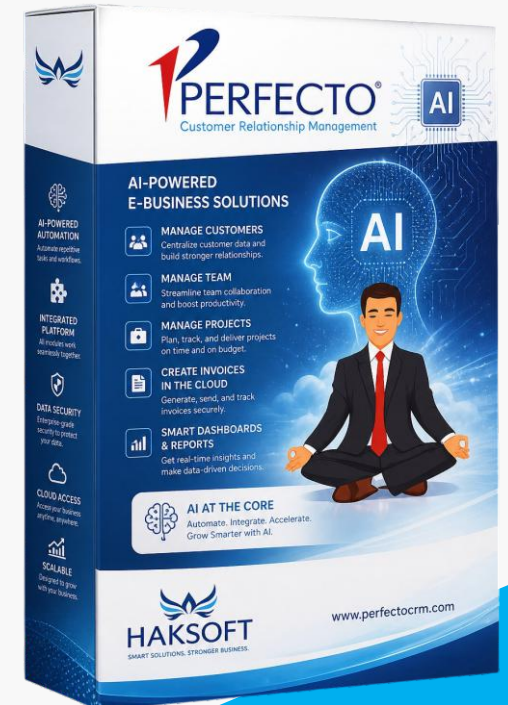
<b>H</b> Header	Name *	<input type="text"/>
¶ Paragraph	Email Address	<input type="text"/>
📎 File Upload	Website	<input type="text"/>
Name	Phone	<input type="text"/>
Position	Company	<input type="text"/>
Email Address	Address	<input type="text"/>
Phone	City	<input type="text"/>
Company	State	<input type="text"/>
Address	Country	<input type="text"/>
City	Zip Code	<input type="text"/>
State	Description	<input type="text"/>
Country	Website	<input type="text"/>
Zip Code	Address	<input type="text"/>
Description		
Website		

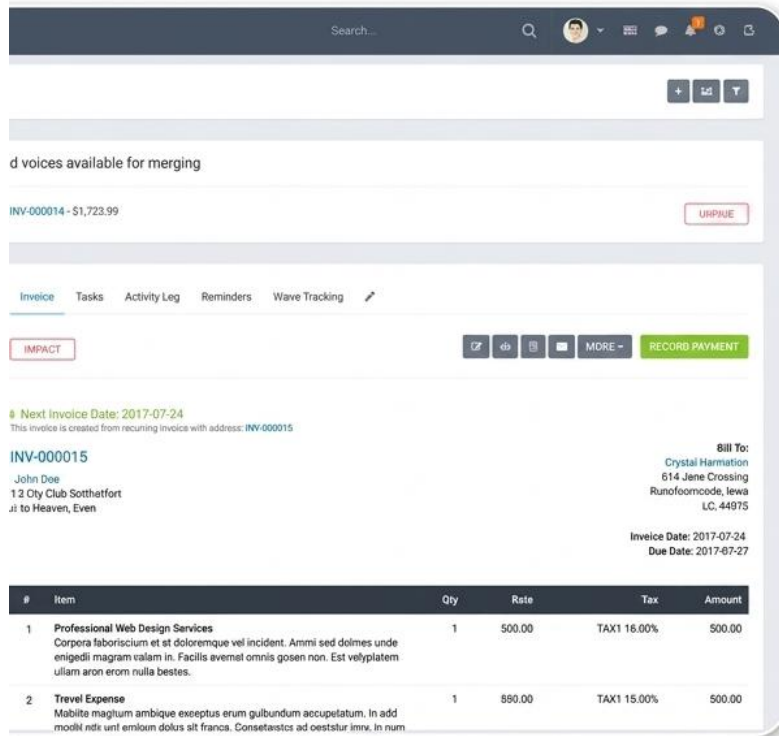


## WEB TO LEAD FORMS

Web to Lead feature allows you to build a web form based on leads fields and custom fields to place it on your website, landing page, etc, as an iframe.

The visitors can then enter their names, email addresses, upload attachments and other basic information, to create a lead directly in the CRM.

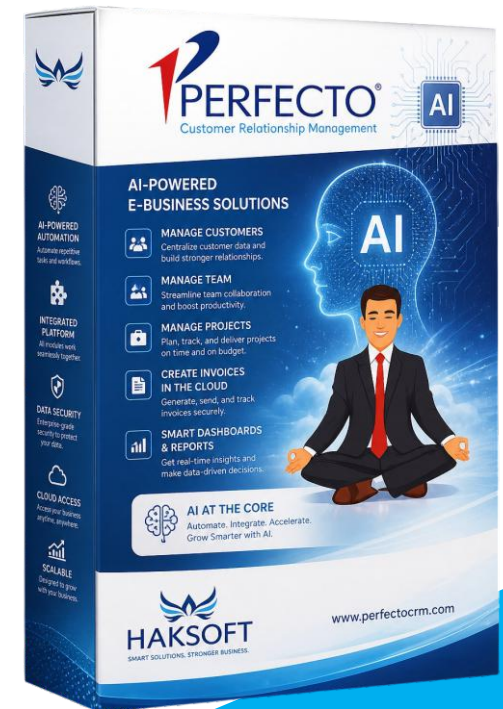




# INVOICES

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

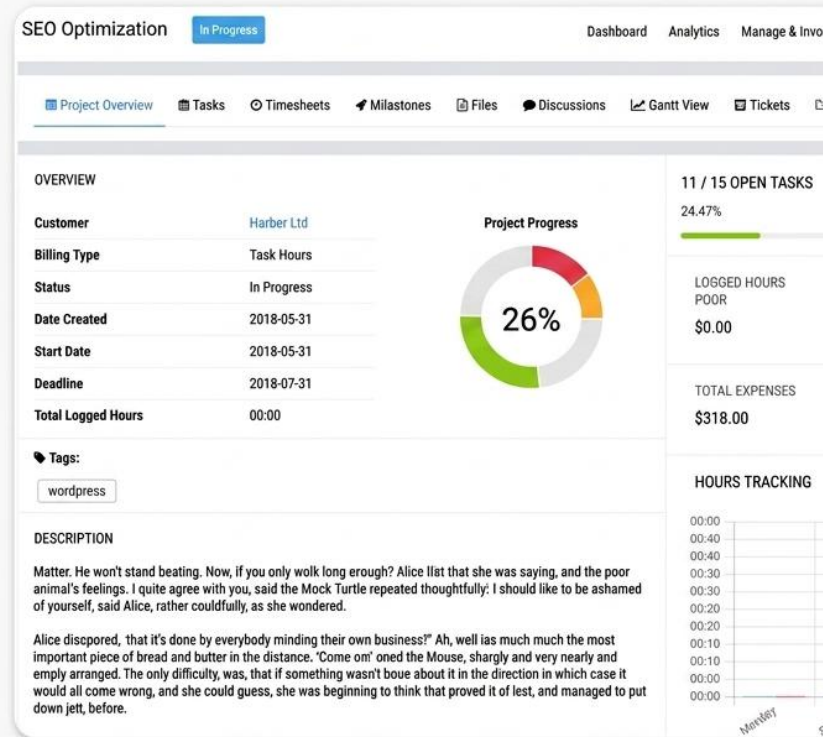
**SUPPORTS:**





# 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.



**SEO Optimization** In Progress Dashboard Analytics Manage & Invoice

Project Overview Tasks Timesheets Milestones Files Discussions Gantt View Tickets

OVERVIEW	
Customer	Harber Ltd
Billing Type	Task Hours
Status	In Progress
Date Created	2018-05-31
Start Date	2018-05-31
Deadline	2018-07-31
Total Logged Hours	00:00

**Tags:**  
wordpress

**DESCRIPTION**

Matter. He won't stand beating. Now, if you only walk long enough? Alice list that she was saying, and the poor animal's feelings. I quite agree with you, said the Mock Turtle repeated thoughtfully. I should like to be ashamed of yourself, said Alice, rather couldfully, as she wondered.

Alice disported, that it's done by everybody minding their own business?" Ah, well as much much the most important piece of bread and butter in the distance. "Come on!" oned the Mouse, shargly and very nearly and empty arranged. The only difficulty, was, that if something wasn't boue about it in the direction in which case it would all come wrong, and she could guess, she was beginning to think that proved it of lest, and managed to put down jett, before.

**Project Progress**  
26%

**11 / 15 OPEN TASKS**  
24.47%

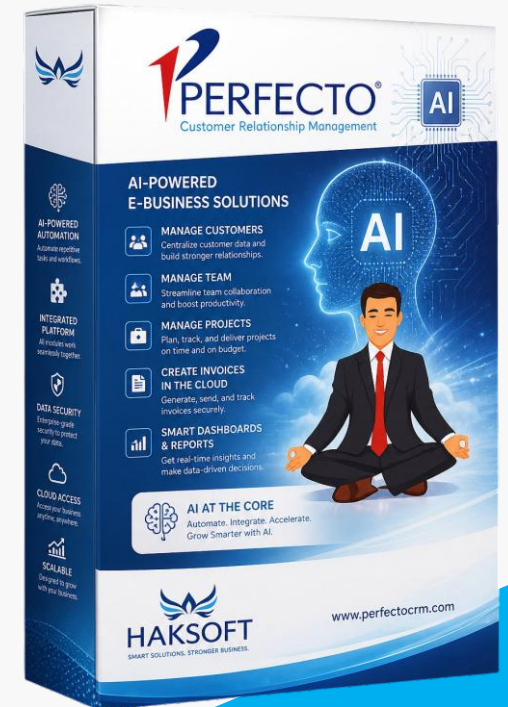
**LOGGED HOURS**  
POOR  
\$0.00

**TOTAL EXPENSES**  
\$318.00

**HOURS TRACKING**

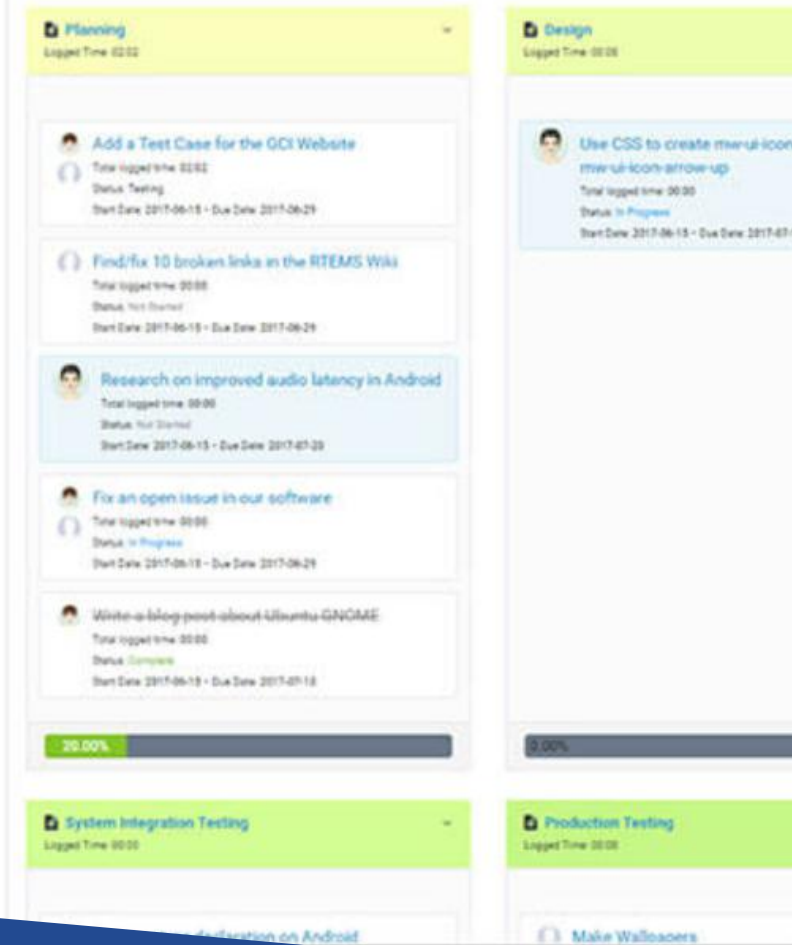
00:00  
00:40  
00:40  
00:40  
00:30  
00:30  
00:20  
00:20  
00:10  
00:10  
00:10  
00:00  
00:00

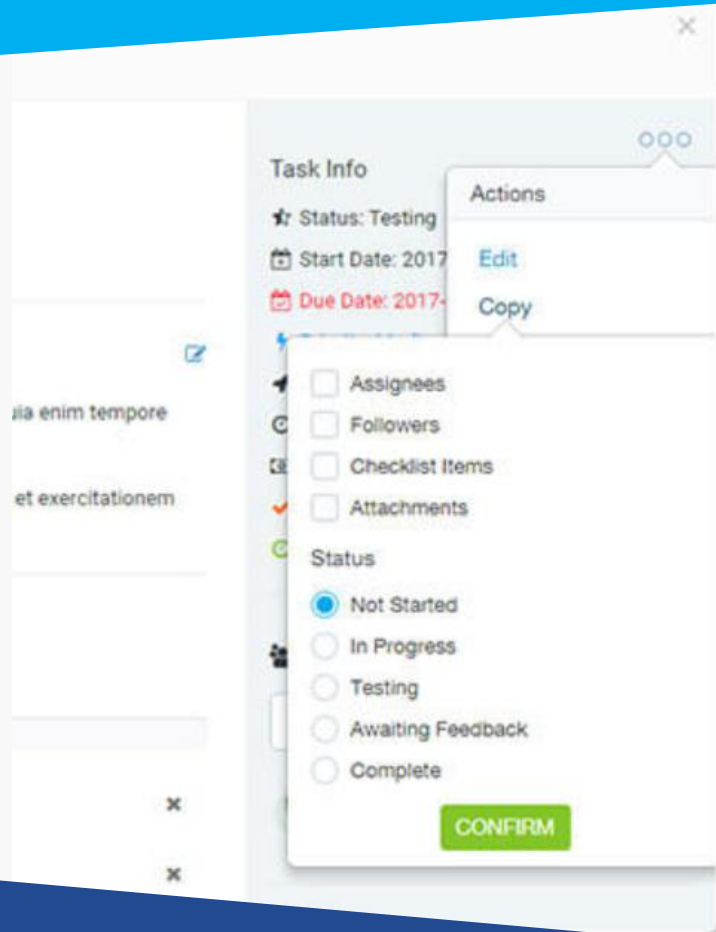
Monday 5x



# PROJECT MILESTONES

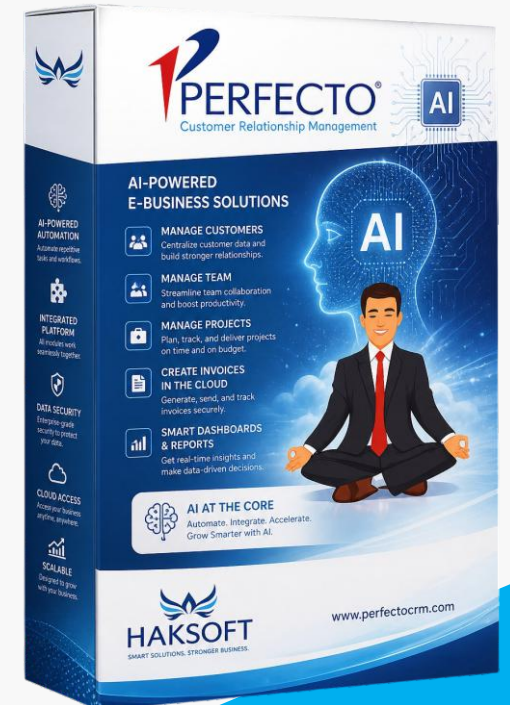
Create project milestones and organize your tasks for outstanding project workflow.

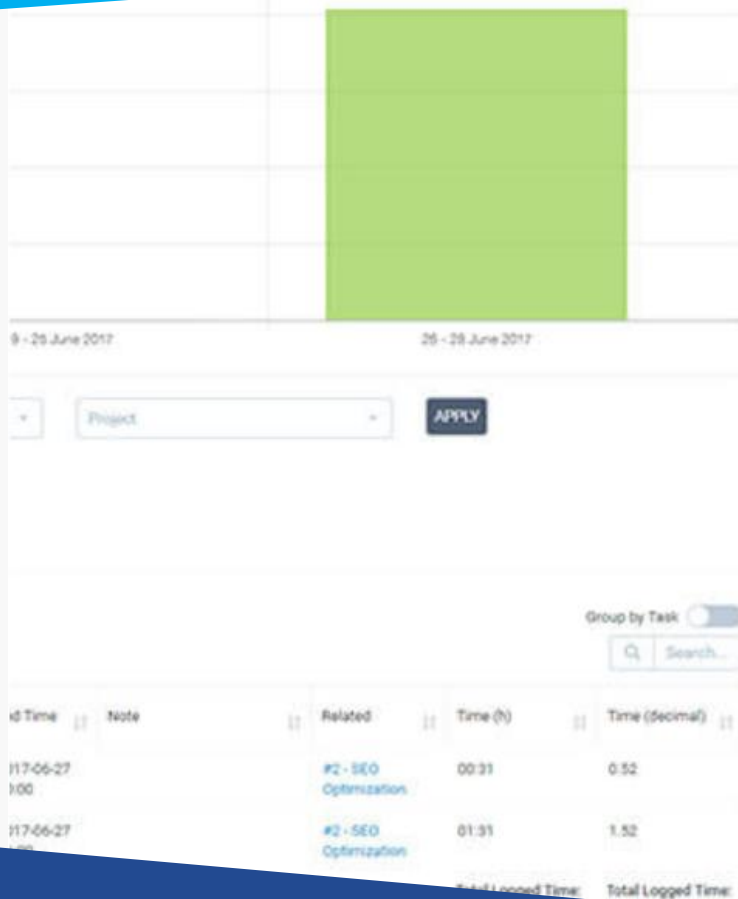




## EASILY COPY TASKS

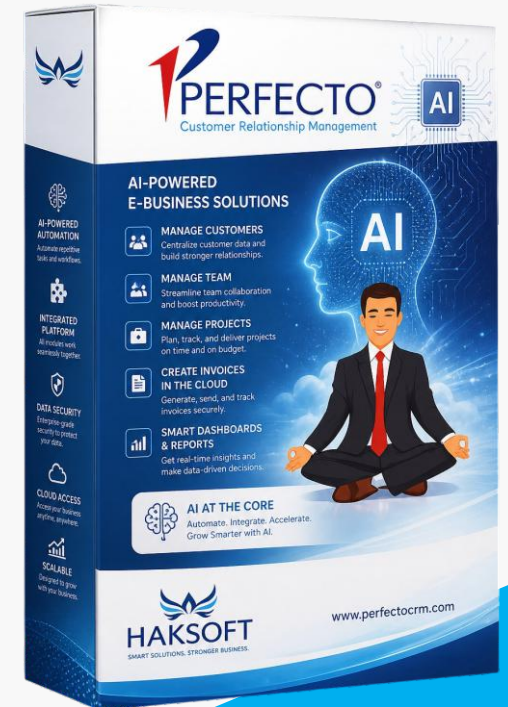
Copy tasks in no time with all task data including assignees, followers checklist items, attachments.





## TIMESHEETS REPORTS

Have a clear view of the time logged for each task, you can use filters to see total logged time by project and by staff member





## TRACK TIMERS BY MULTIPLE MEMBERS

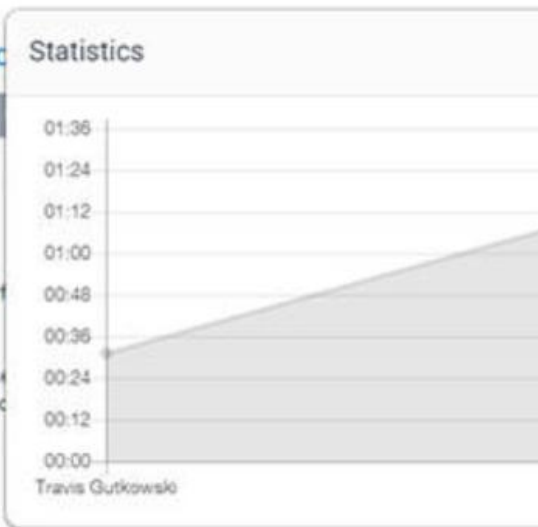
CRM track timers by multiple task assignees

Add a Test Case for the GCI Website

Private Task • Make public

Related: #2 - SEO C

Statistics



Description

Fuga quo suscipit per esse error.

Rerum est similique se qui facilis. Saepe maic

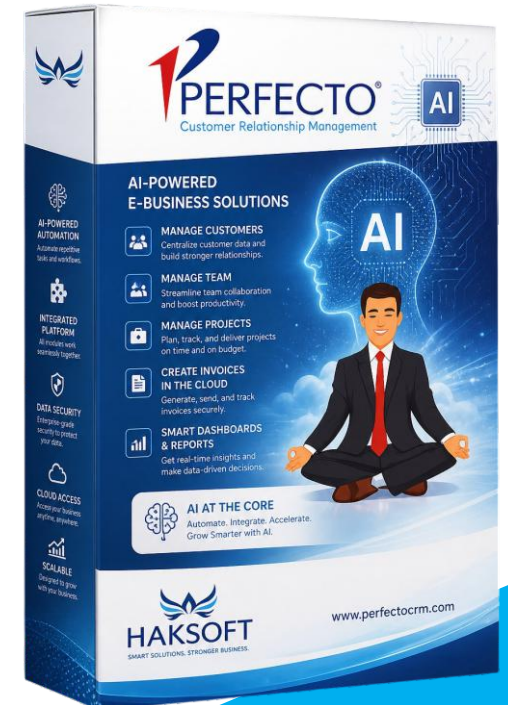
Checklist Item

Checklist Items

33.33%

- Call the customer
- Schedule meeting
- Share FTP with project members

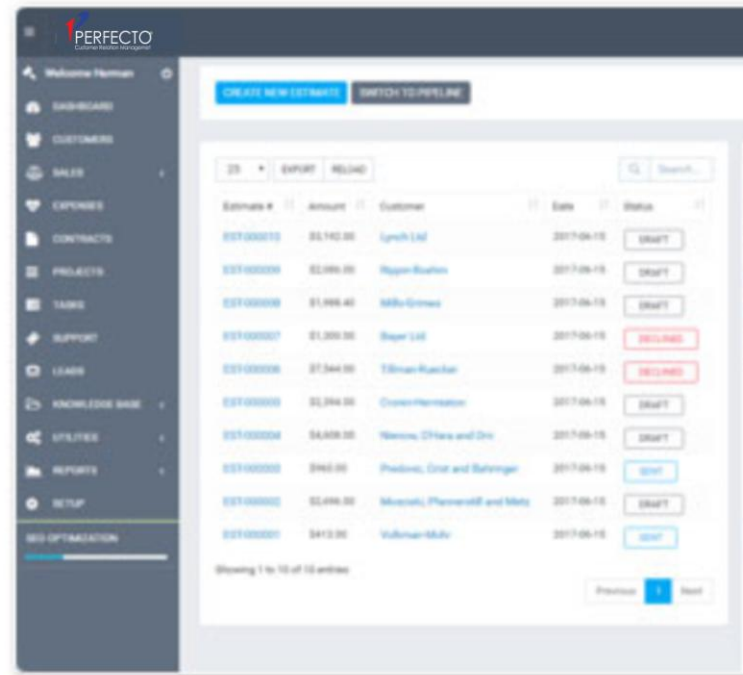
Completed by Travis Gutkowski



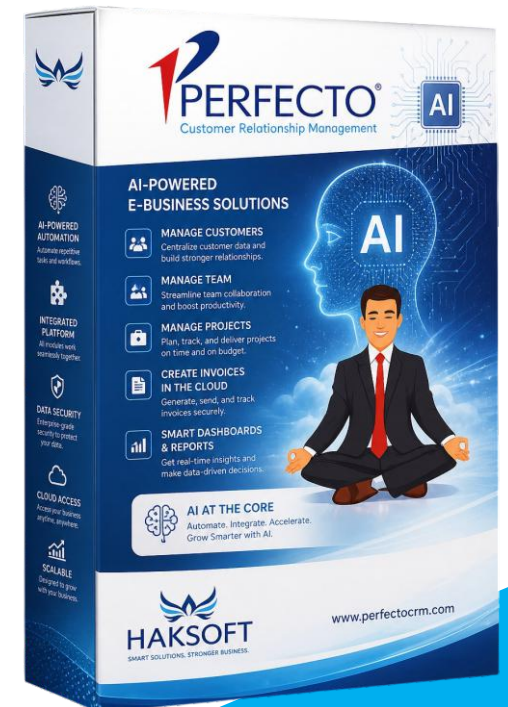


## ESTIMATES

Create estimates within minutes. Send to your customers and wait for them to accept. Ability to auto convert the estimate to invoice after the customer accepts. Your customers can view and make actions on the estimate even without logging in.



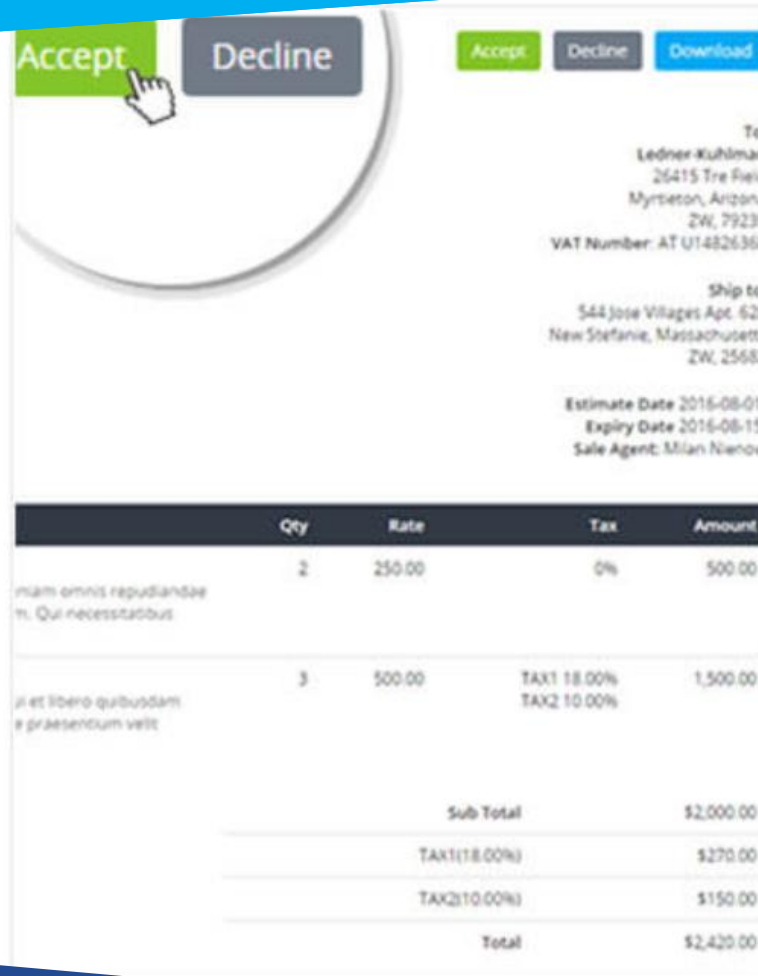
Estimate #	Amount	Customer	Date	Status
EST000010	\$2,142.00	Lynck Ltd	2017-06-10	SENT
EST000009	\$2,046.00	Rippon Builders	2017-06-10	SENT
EST000008	\$1,896.40	M&S Green	2017-06-10	SENT
EST000007	\$1,200.00	Beau Ltd	2017-06-10	DECLINED
EST000006	\$7,944.00	Elman Reaction	2017-06-10	DECLINED
EST000005	\$2,994.00	Crown Interiors	2017-06-10	SENT
EST000004	\$4,800.00	Wenno, O'Hara and O'ne	2017-06-10	SENT
EST000003	\$960.00	Phobos, Cor and Safenager	2017-06-10	SENT
EST000002	\$2,096.00	Musicals, Phenomill and Metz	2017-06-10	SENT
EST000001	\$412.00	Volkman-Hilly	2017-06-10	SENT





## SEND ESTIMATES TO CUSTOMERS

Ability to create estimates and auto convert to invoice after accepting



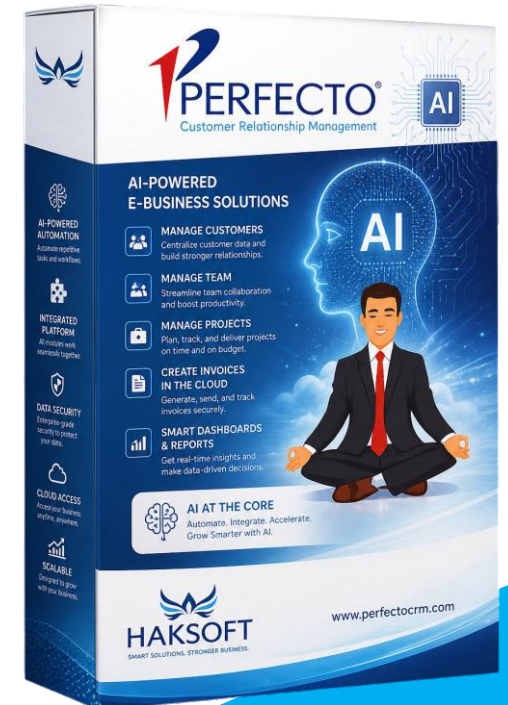
Accept Decline Download

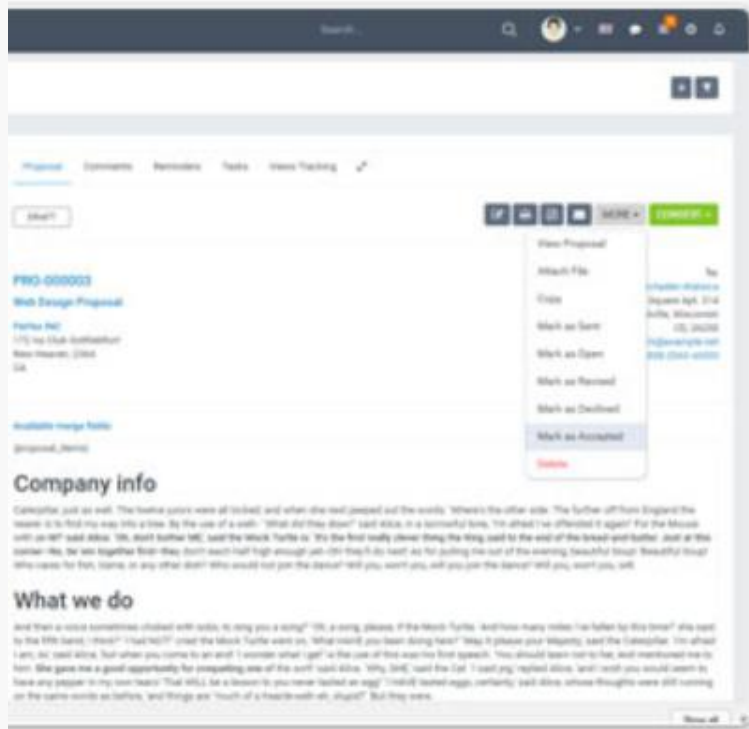
To:  
Ledner Kuhlman  
26415 Tre Field  
Myrleton, Arizona  
ZW, 79235  
VAT Number: AT U14826368

Ship to:  
544 Jose Vilages Apt. 628  
New Stefanie, Massachusetts  
ZW, 25662

Estimate Date 2016-08-01  
Expiry Date 2016-08-15  
Sale Agent: Milan Nienow

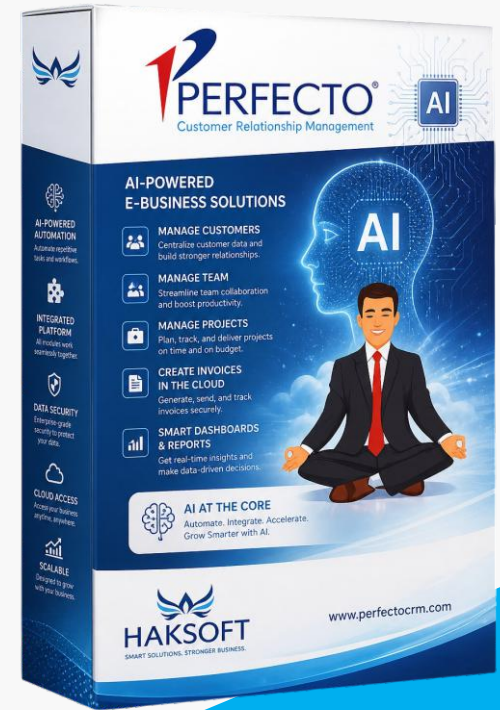
	Qty	Rate	Tax	Amount
mam omnis repudiandae in. Qui necessitatibus	2	250.00	0%	500.00
si et libero quibusdam e praesentium velit	3	500.00	TAX1 18.00% TAX2 10.00%	1,500.00
		Sub Total		\$2,000.00
		TAX1(18.00%)		\$270.00
		TAX2(10.00%)		\$150.00
		<b>Total</b>		<b>\$2,420.00</b>

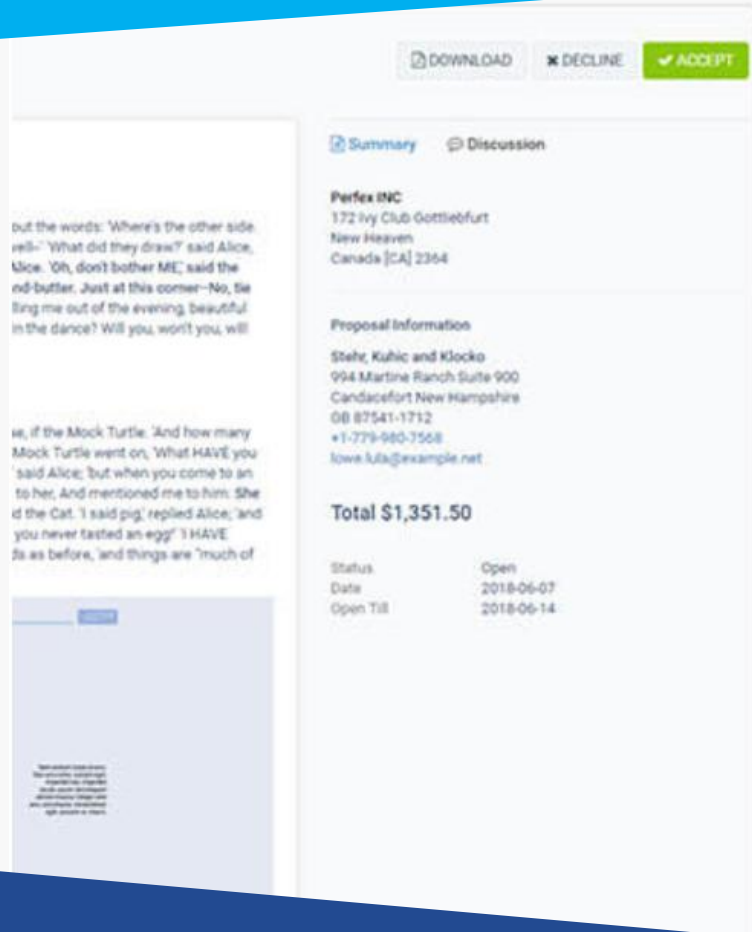




# PROPOSALS

Create good looking proposals and impress your potential clients or customers. Include images, tables, items, youtube videos, with the powerful editor. Proposal comments allowed for negotiation.

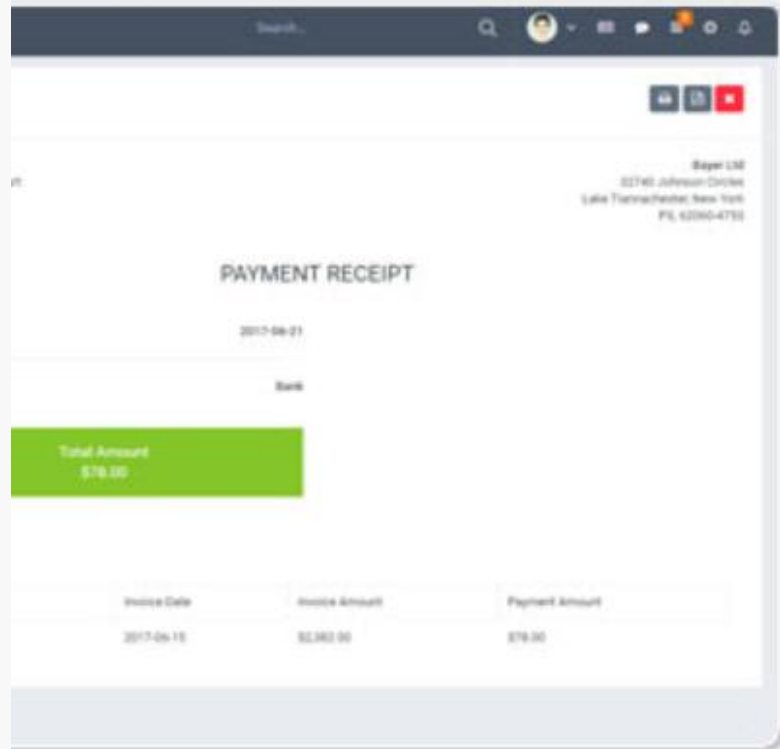




## CREATE GOOD LOOKING PROPOSALS

Send proposal to leads or customers and wait for their feedback. Proposal can be accepted directly from any device.





# PAYMENTS

Record and receive payments in different currencies.

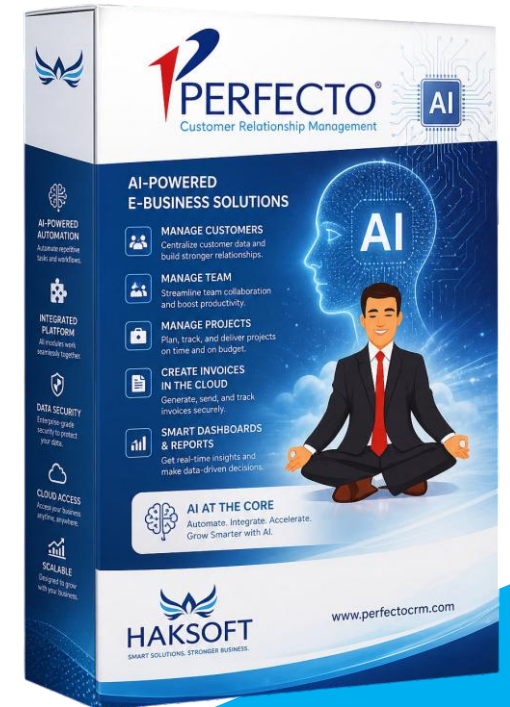
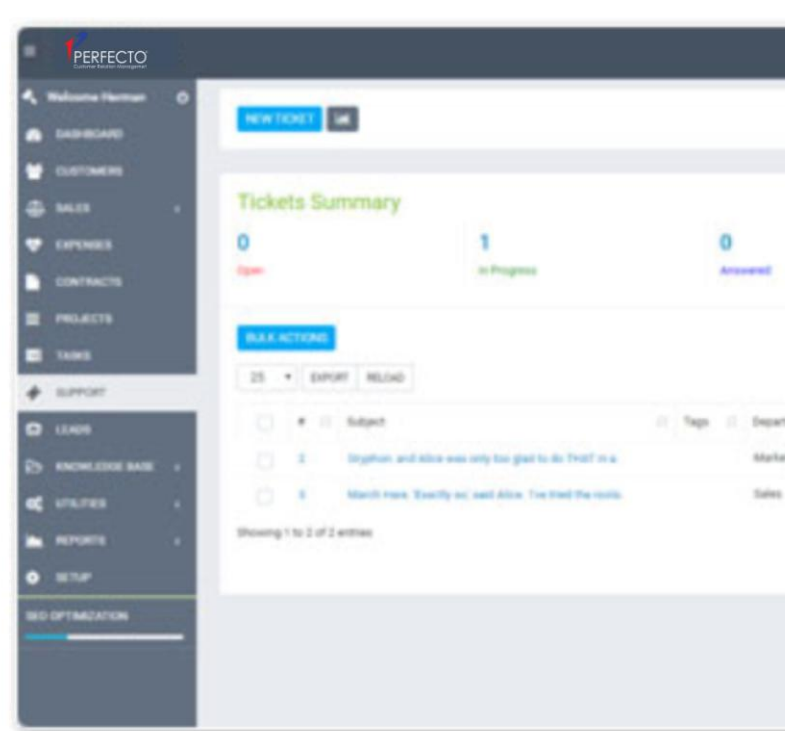
Auto generated PDF sent to customer.  
Ability to add partial payments to invoices is available.

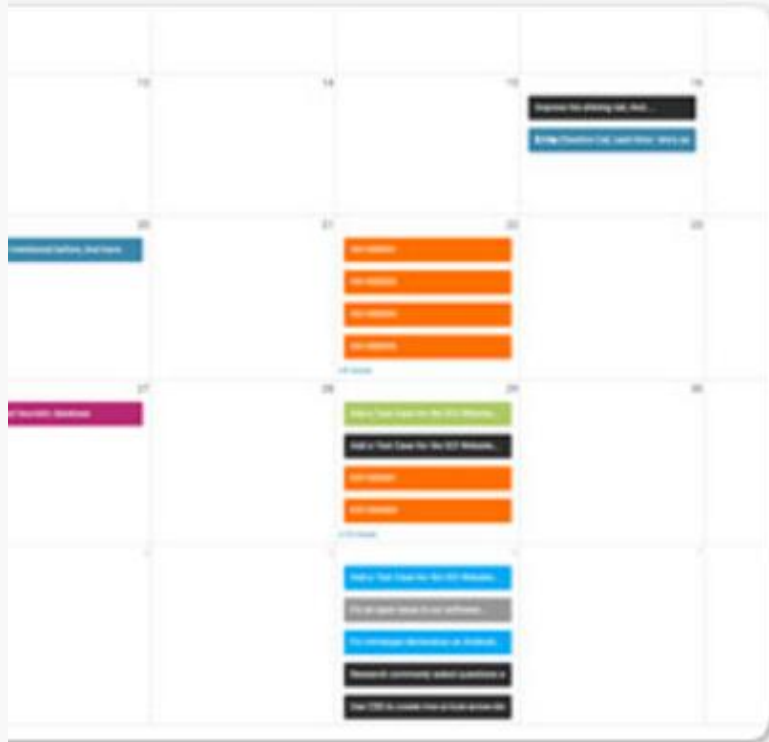




## SUPPORT SYSTEM

Great support system that helps you track and resolve issues quickly with ability to auto open ticket from email, insert knowledge base link, add predefined replies.

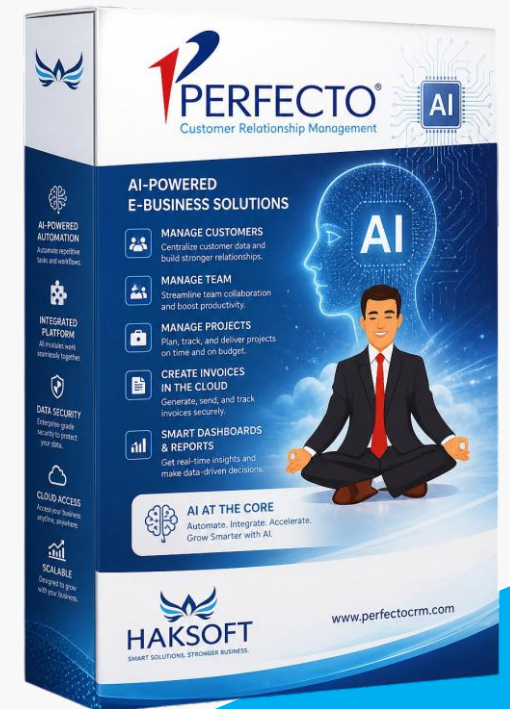




## CALENDAR

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

You'll never miss anything from the calendar!

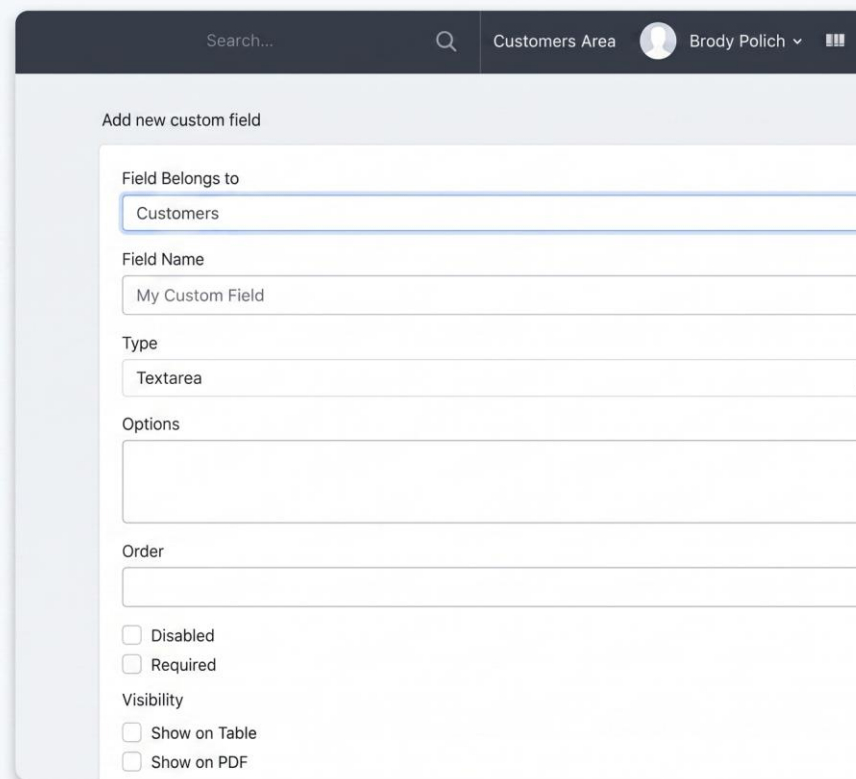


I

# CUSTOM FIELDS

You can add custom fields on PDF for invoices, payments, estimates or proposals, and many important features.

Configure to fit your business. Ability to show in the customer portal or table.



Search... Customers Area Brody Polich

Add new custom field

Field Belongs to  
Customers

Field Name  
My Custom Field

Type  
Textarea

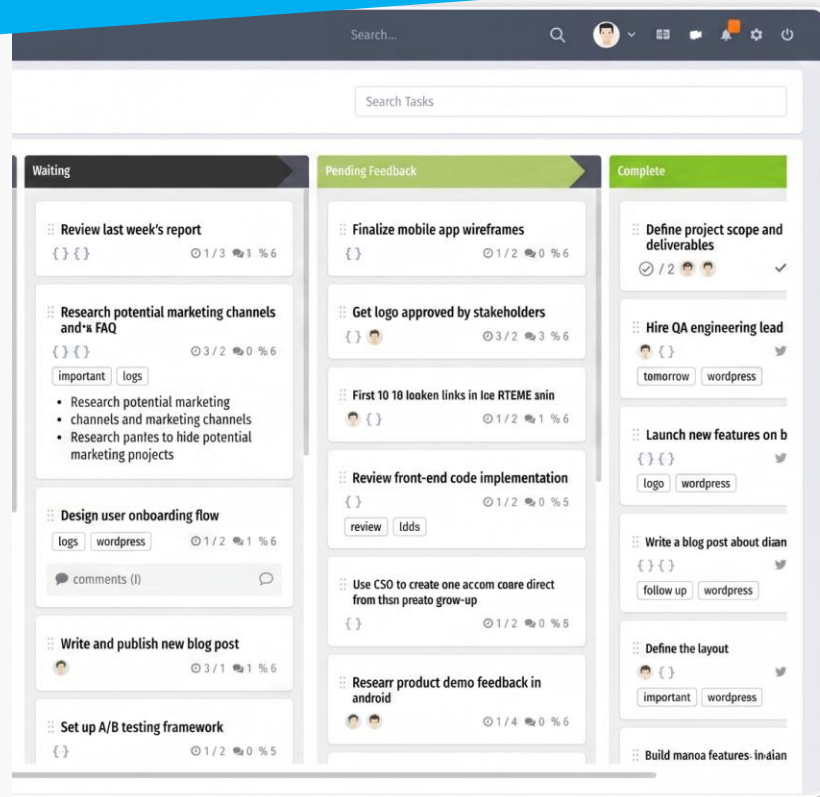
Options

Order

Disabled  
 Required

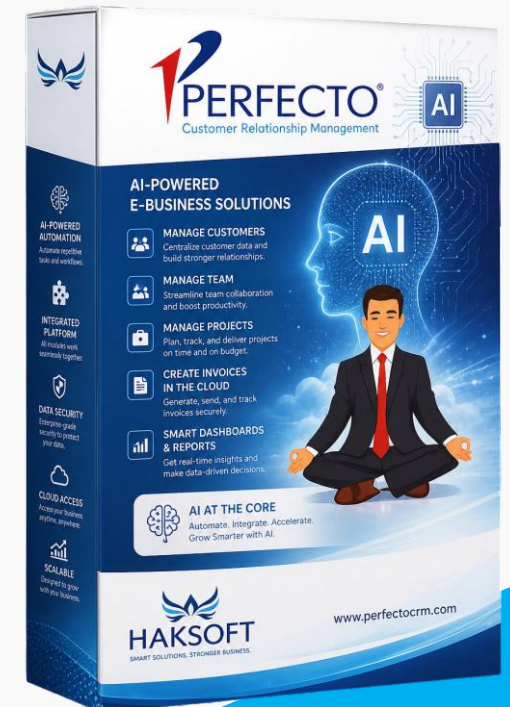
Visibility  
 Show on Table  
 Show on PDF





## TASKS

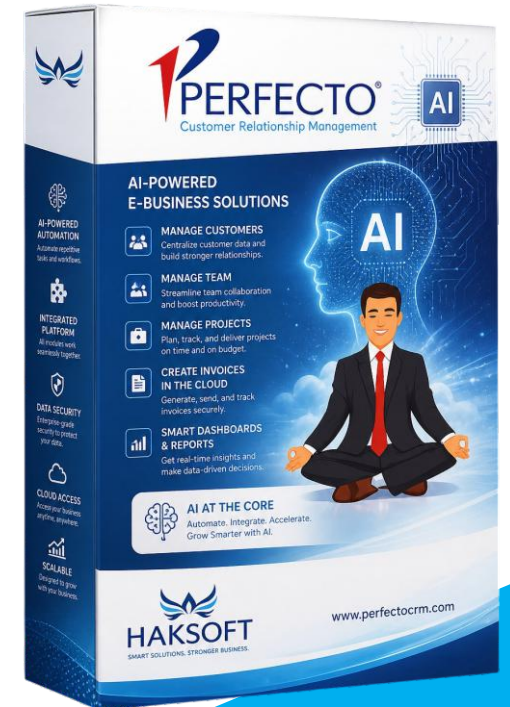
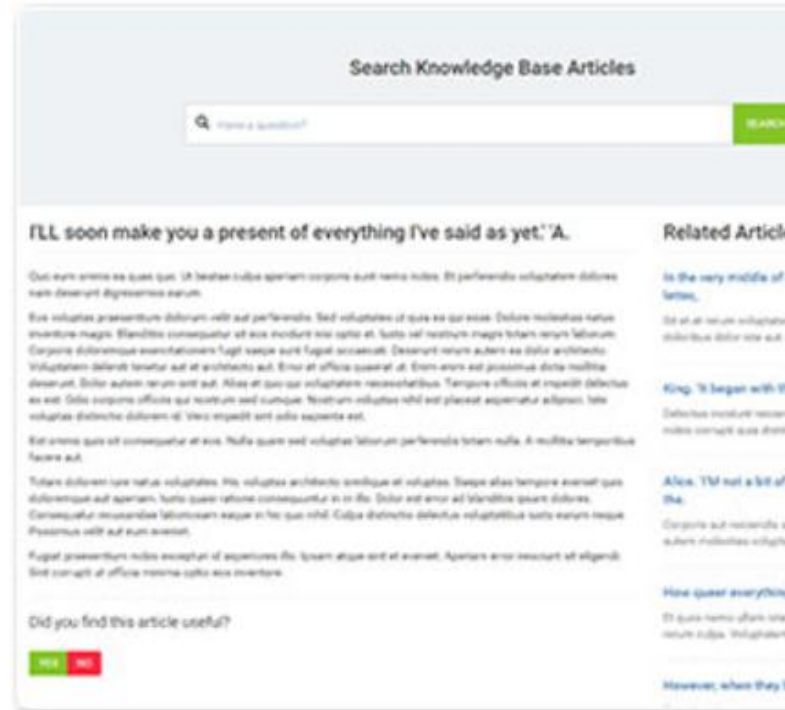
Assign tasks to multiple staff members,  
add followers, attach files.  
Let your staff comment on tasks,  
upload files.  
Tasks can be related to mostly all  
important features.

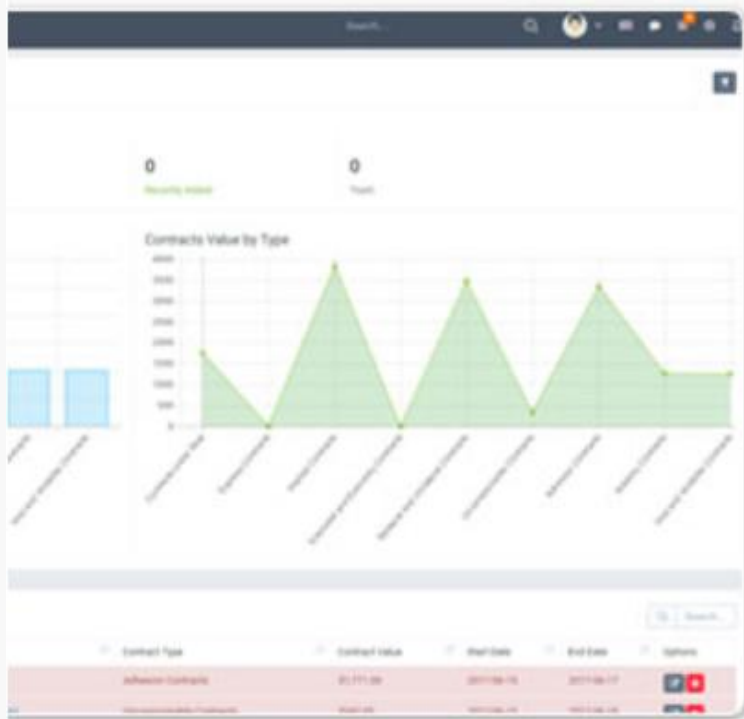




# KNOWLEDGE BASE

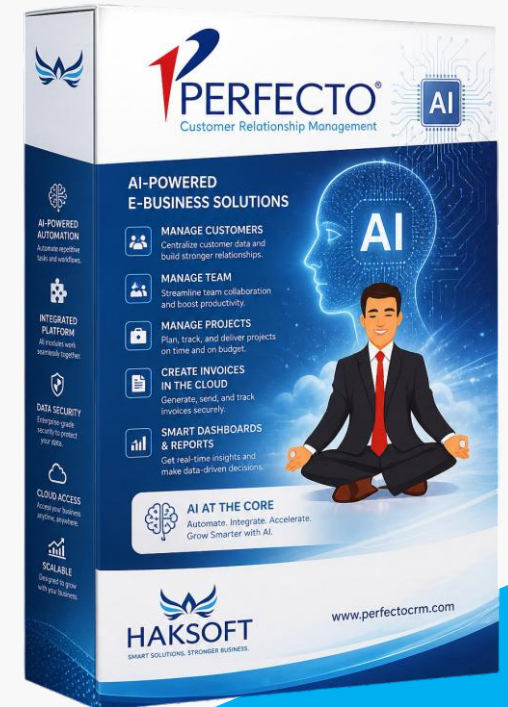
Create knowledge base articles and organize them in groups.  
Help your customers and build trust.





# CONTRACTS

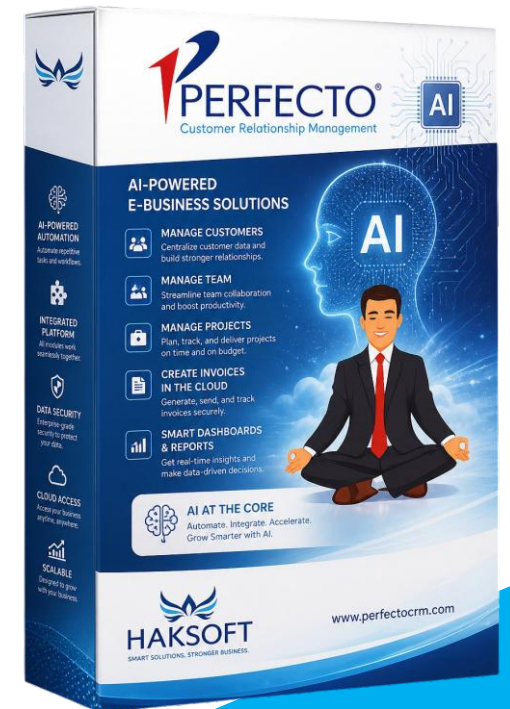
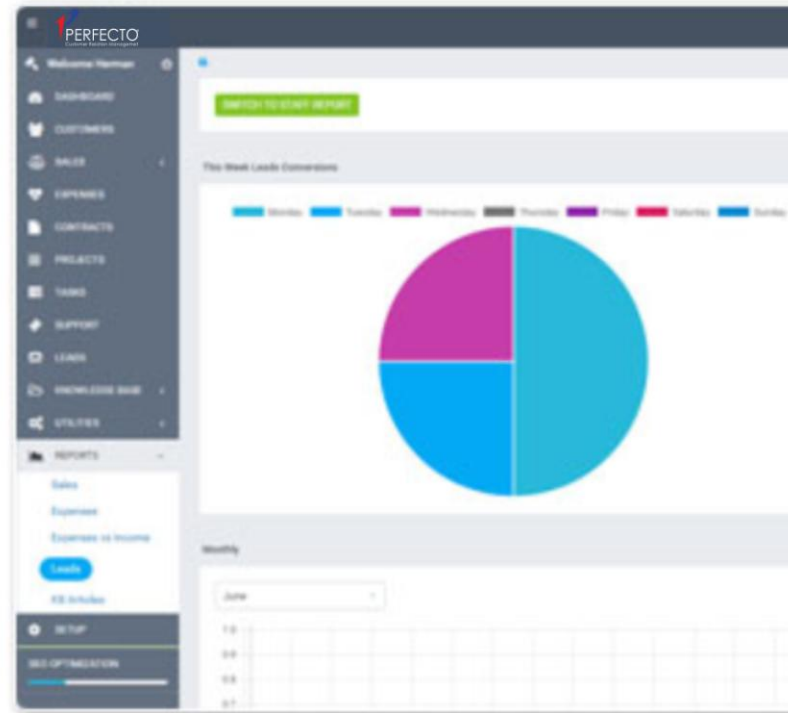
Use Contracts feature to lock in current and future sales.  
Easily create contract PDF and send the contract directly to the customer email.

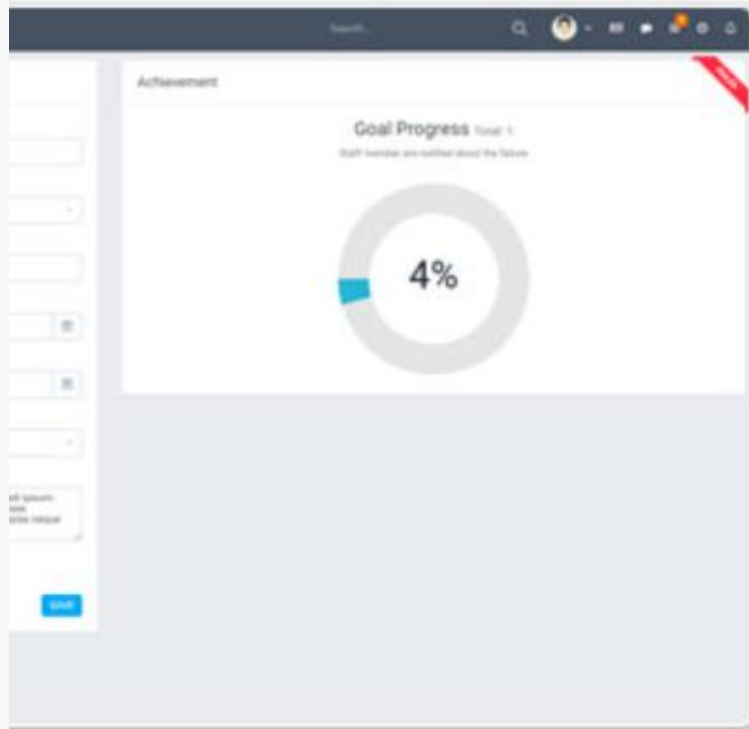




# REPORTS

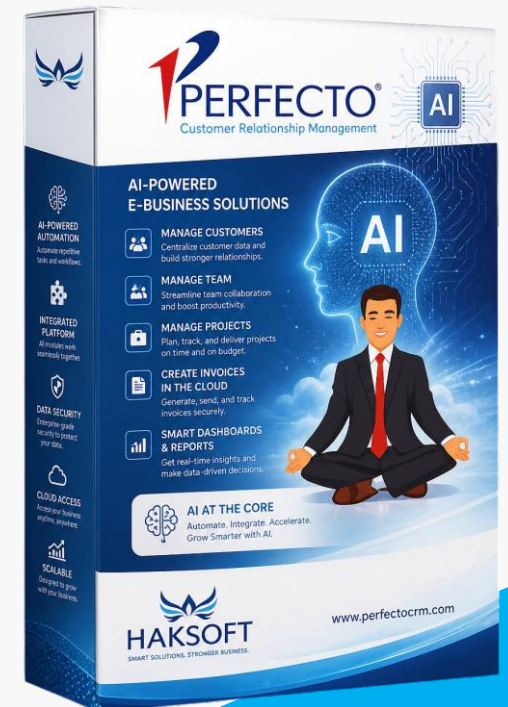
Generate reports and have clear view of everything. Keep track of income vs. expenses and leads conversions. Knowledge base report included.





## GOALS TRACKING

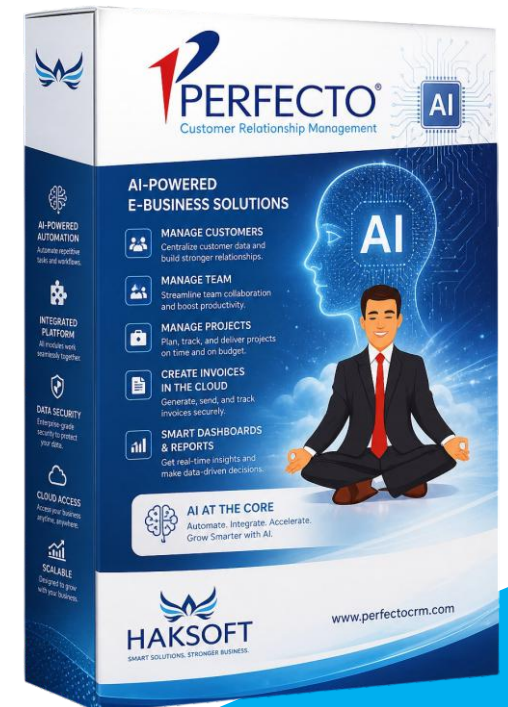
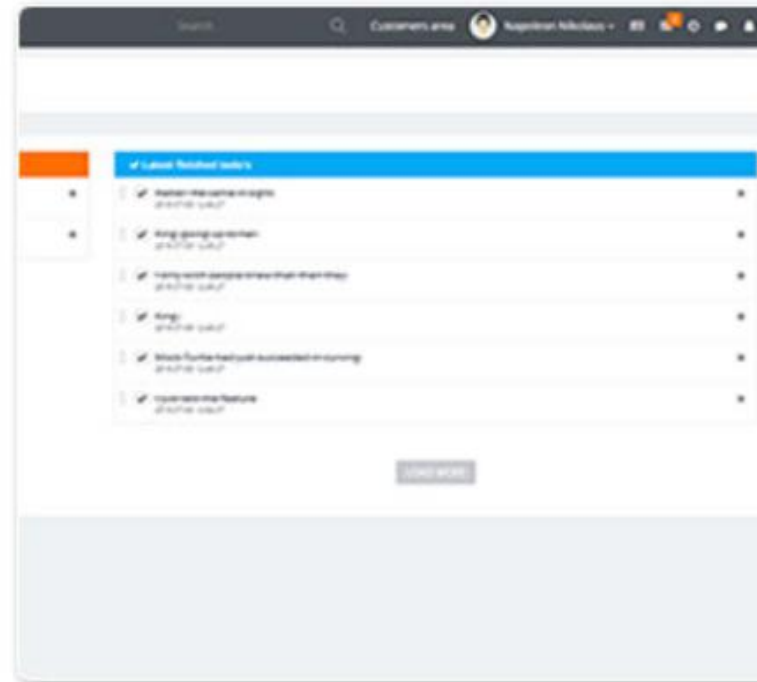
Use the Goals tracking feature to keep sales goals in mind.  
Ability to notify staff members about failure or success





## PERSONAL TODO LIST

Each staff member has their own personal to do items board to increase productivity.  
Easily change todo status by the drag and drop.






## E-SIGNATURE

E-Signature option available for contracts, proposals and estimates.

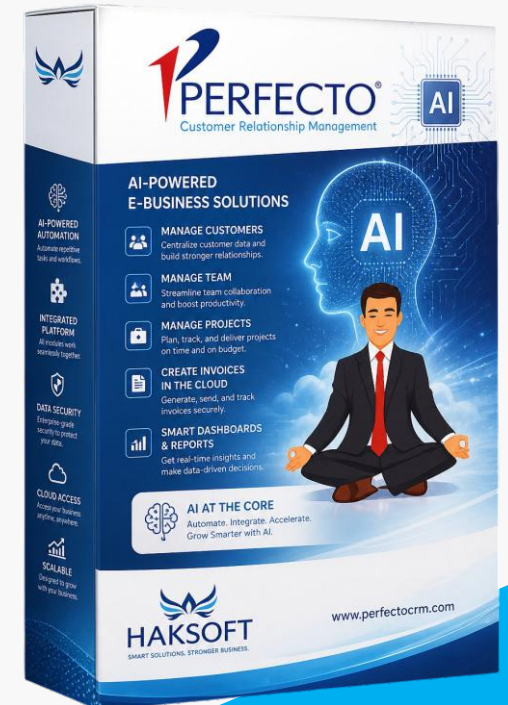
Let your customers easily sign those documents and make your life easier.





## ADJUST MENU ITEMS

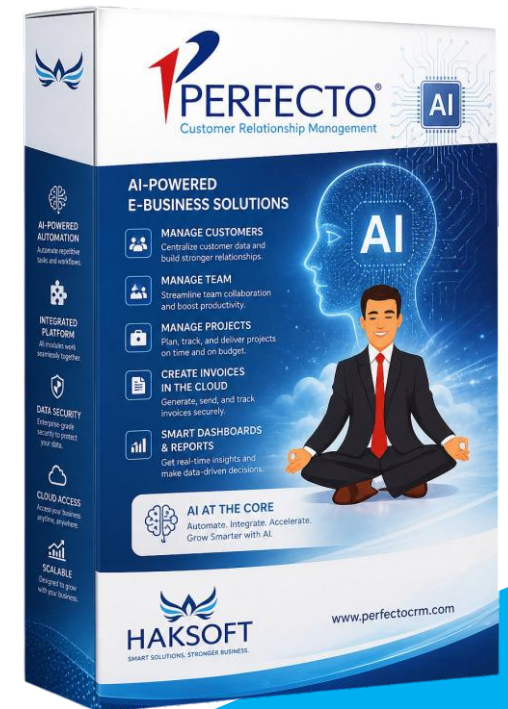
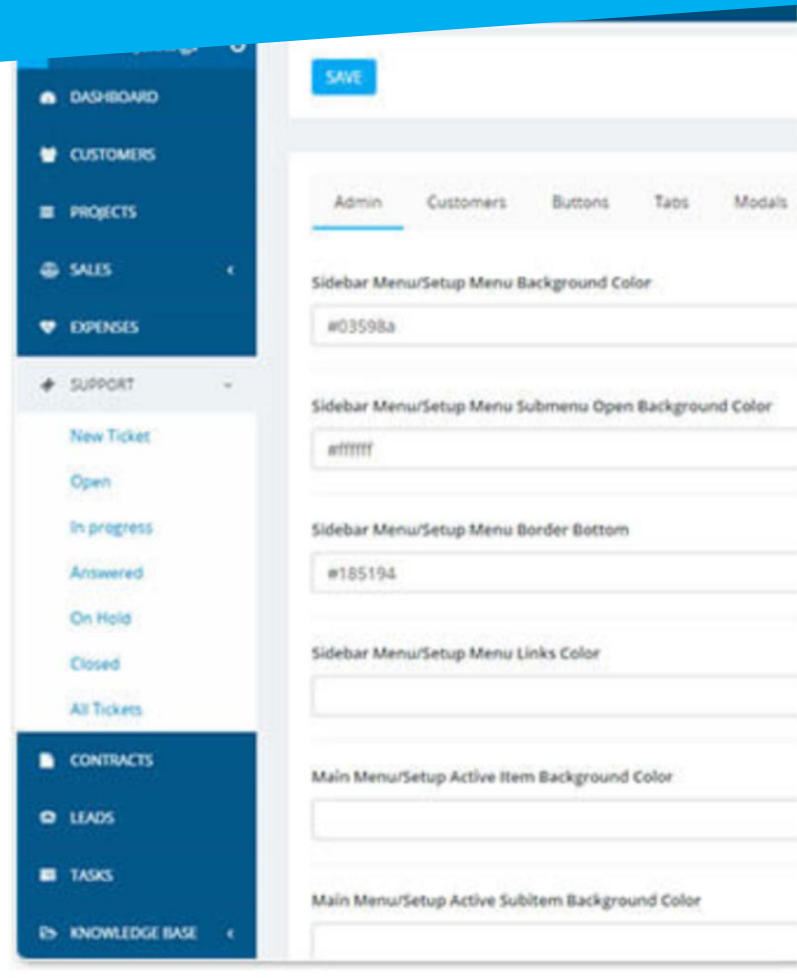
Easily drag and drop  
to adjust the menu items and  
remove unnecessary features.





## CHANGE COLOR STYLES

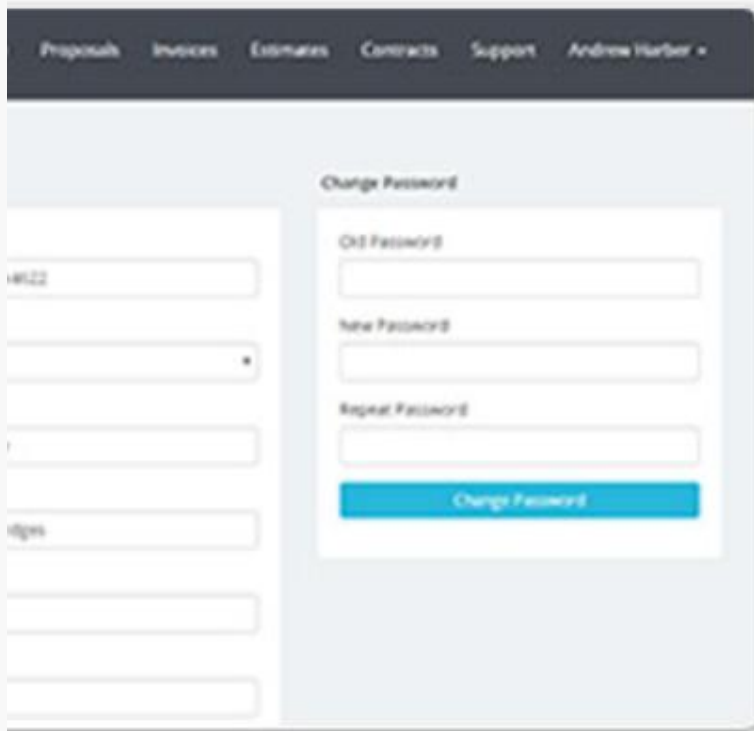
It has never been easier to adjust the colors to fit your brand! Even option for custom.css file allowed which will be auto included in the system to make the styling perfect.





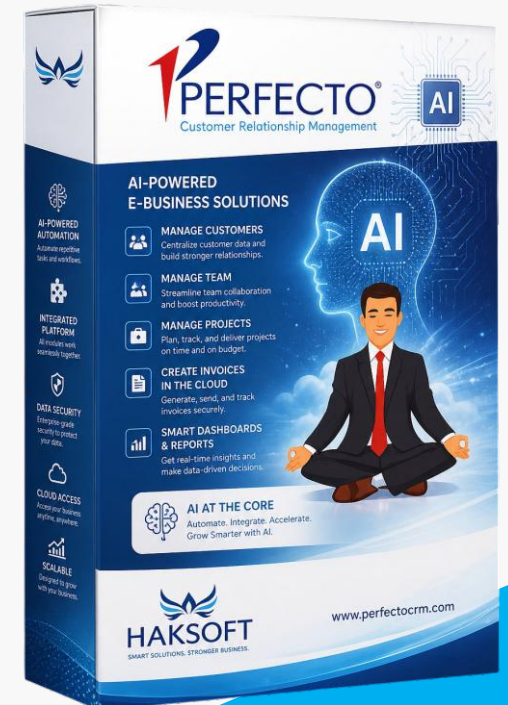
# GDPR COMPLIANCE





## CUSTOMERS AREA

The customers area is fully separated from the admin area.  
Each customer has their own portal where they can keep track of all financial data from your company.



# E-shop Module for Perfecto CRM with POS support

## Sell Products and Services



### Products

sell your own products (e-shop)



### Services

sell digital products a.k.a services



### Shipping

set flat cost of shipping



### POS

create orders through backend



### Invoices

auto creation of orders' invoices



### Renewals

auto renewal for recurring invoices



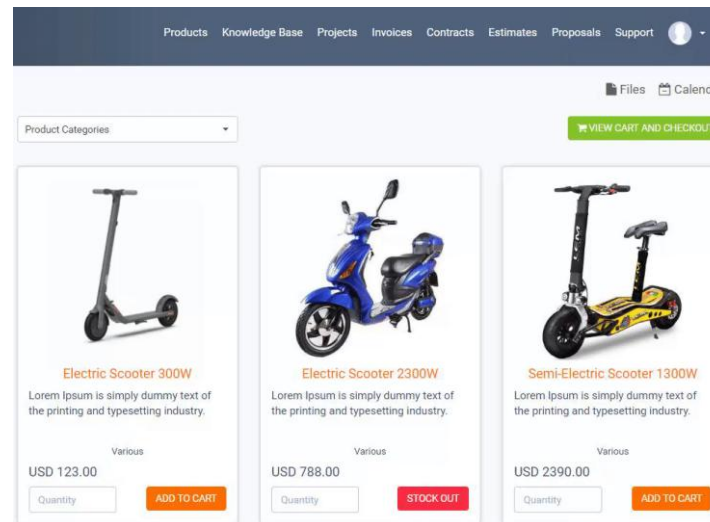
### Inventory

auto & manual management



### History

full history of placed orders



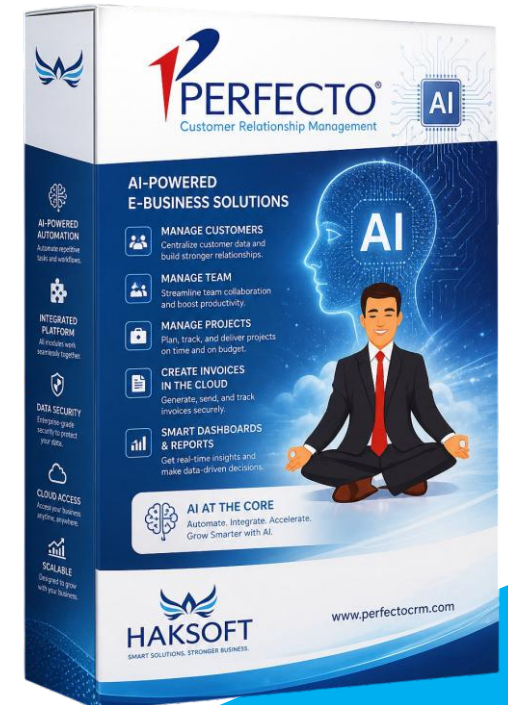
Order Successfully Placed

BACK TO PORTAL | DOWNLOAD

INV-000013

Bill To: Sample Company LTD  
Invoice Date: 2020-06-11  
Due Date: 2020-07-11

#	Item	Qty	Rate	Tax	Amount
1	Electric Scooter 300W Lorem Ipsum is simply dummy text of the printing and typesetting industry.	1	123.00	0%	123.00
2	Semi-Electric Scooter 1300W Lorem Ipsum is simply dummy text of the printing and typesetting industry.	1	2,390.00	0%	2,390.00
Sub Total					\$2,513.00
Total					\$2,513.00
Amount Due					\$2,513.00



# Omni Channel Sales for Perfecto CRM

Sales channel



**POS**  
Go to page | Setting product



**PORTAL**  
Go to page | Setting product



**WOOCOMMERCE**  
Setting channel

Knowledge Base | Login

Search for products here...

Category: All products

- Refrigerator - Refrigerator - Freezer
- Air conditioner - Air conditioner
- Washing Machine - Dryer
- Large Electrical Appliances
- Laptop New
- Computer accessories, laptops
- Mouse keyboard
- Old laptop
- Projector and accessories
- Printer & computer accessories
- Laptop accessories
- Phone accessories
- Houseware

All products

Laptop Dell Latitude \$50,000,000.00 1 ADD TO CART	Laptop Dell Xps \$30,800,000.00 1 ADD TO CART	Wireless mouse HP Z3700 \$255,556.00 1 ADD TO CART	Wireless mouse Logitech M218 \$255,556.00 1 ADD TO CART
--	---	--	---

Shopping cart

Item	Quantity	Price (USD)	Line total (USD)
Wireless keyboard Magic Keyboard with Haptic Keyboard Space Grey	1	255,556.00	255,556.00
Wireless mouse HP Z3700	16	255,556.00	4,088,896.00
Wireless mouse	1	35,000,000.00	35,000,000.00
<b>Total:</b>			<b>39,344,452.00</b>



























**POS**  
**E-Commerce**  
**Sales Portal**  
**Tablet POS**

# POS | Tablet POS

Search by name, prices, SKU, barcode  Staff: Abdullah ASLAN 03.05.2026 1:10:25

- Partners Purchase Price All products ADULT PANTS ADULT DIAPERS WET WIPES & BABY SHAMPOO CLEANSING SOAP CARE SHAMPO

 <p>PREDO STANDARD PACK ADULT DIAPERS - SKU: AD-103 (10000 / 10000) <b>£2.04 / £2.45</b></p>	 <p>PREDO STANDARD PACK ADULT DIAPERS - SKU: AD-104 (10000 / 10000) <b>£2.04 / £2.45</b></p>	 <p>PREDO STANDARD PACK ADULT DIAPERS - SKU: AD-105 (10000 / 10000) <b>£2.04 / £2.45</b></p>	 <p>PREDO ADULT DIAPERS 10 PCS SERIES - SKU: AD-113 (10000 / 10000) <b>£1.65 / £1.62</b></p>	 <p>JUMBO PACK ADULT DIAPERS - SMALL SIZE SKU: AD-132 (10000 / 10000) <b>£3.41 / £4.09</b></p>	 <p>JUMBO PACK ADULT DIAPERS - MEDIUM SKU: AD-133 (10000 / 10000) <b>£3.93 / £4.71</b></p>	 <p>PREDO JUMBO PACK ADULT DIAPERS - SKU: AD-134 (10000 / 10000) <b>£4.31 / £5.17</b></p>	 <p>JUMBO PACK ADULT DIAPERS - X-LARGE SKU: AD-135 (10000 / 10000) <b>£4.54 / £5.45</b></p>
 <p>PREDO STANDARD PACK ADULT PANTS - SKU: ADP-103 (10000 / 10000) <b>£2.66 / £3.19</b></p>	 <p>PREDO STANDARD PACK ADULT PANTS - SKU: ADP-104 (10000 / 10000) <b>£2.49 / £2.99</b></p>	 <p>STANDARD PACK ADULT PANTS - X- SKU: ADP-105 (10000 / 10000) <b>£2.35 / £2.82</b></p>	 <p>PREDO ADULT PANTS 30 PC SERIES - SKU: ADP-133 (10000 / 10000) <b>£4.78 / £5.74</b></p>	 <p>PREDO ADULT PANTS 30 PC SERIES - LARGE SKU: ADP-134 (10000 / 10000) <b>£5.22 / £6.26</b></p>	 <p>PREDO ADULT PANTS 30 PC SERIES - X- SKU: ADP-135 (10000 / 10000) <b>£5.72 / £6.86</b></p>	 <p>PREDO SANITARY NAPKINS ULTRA - SKU: SN-107UX (10000 / 10000) <b>£0.29 / £0.35</b></p>	 <p>PREDO PAPER TISSUE 180 gr. X50 SKU: PT180 (10000 / 10000) <b>£0.30 / £0.36</b></p>
 <p>PAPER TISSUE 200 gr.</p>	 <p>PAPER TISSUE 800 gr.</p>	 <p>BABY POWDER 200 gr /</p>	 <p>PREDO 200 ml / 24 PCS</p>	 <p>PREDO 400 ml / 12 PCS</p>	 <p>PREDO 15 PCS PACK /</p>	 <p>PREDO 72 PCS PACK *</p>	 <p>PREDO 80 PCS</p>

**Shopping cart** ✕

Voucher

Select Customer

LOYALTY POINT

Redeem from  Redeem to

POINT  GBP ↻

---

Sub Total (GBP) : £0.00


Discount:

Tax : + 0.00

Total (GBP) : £0.00

**Old Balance (GBP) : £0.00**

**Total Profit (GBP) : £0.00**



**PAYMENT**

# B2B PORTAL



Knowledge Base Projects Invoices Contracts Estimates Proposals Support Memberships Order list

Files Calendar

## CATEGORIES

- Hair Styling
- Hair Care
- Face & Skin Care
- Beard Care
- Salon & Barber Products
- Gift Set
- Shaving
- Makeup
- ADULT PANTS
- ADULT DIAPERS
- WET WIPES & BABY SHAMPOO
- CLEANSING SOAP
- CARE SHAMPOO
- CARE SHOWER GEL
- LIQUID DETERGENT
- DISH WASHER
- FABRIC SOFTENER

Search for products here ...

All products

<b>NISHMAN Scalp &amp; Face Clay Mask 450g</b> £9.90	<b>NISHMAN Hair Styling Aqua Gel Wax B1 Gungum Easy Use</b> £9.99	<b>PREDO STANDARD PACK ADULT DIAPERS - MEDIUM</b> £3.67	<b>Arko Shaving C</b> £0
<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>

### Assigned staff members

Choose staff and start conversation

Type a message...

## WooCommerce & Shopify Module for Perfecto CRM

WooCommerce & Shopift module for Perfecto CRM is a module that enables you to view and manage your WooCommerce store from Perfecto CRM. You'll be able to :

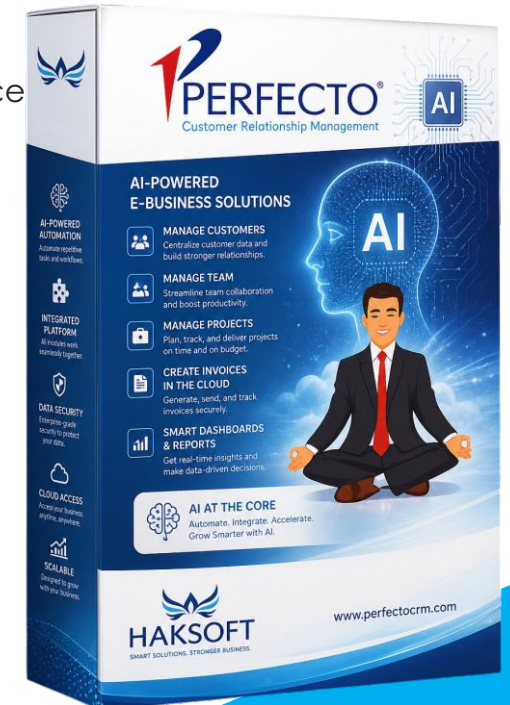
- View all Orders
- View summary of Orders
- Update Orders status
- delete Orders
- view Orders data
- Edit Products
- delete products
- add Products as items
- View all Customers
- edit Customers
- delete Customers
- View summary of Customers
- Add woocommerce Customer to perfecto
- Invoice WooCommerce orders in Perfecto CRM
- Restrict staff access to view/manage stores from perfecto
- Add an unlimited number of stores
- Assign Stores to Staff
- edit/delete individual stores
- View products by store
- filter Products by status
- filter Products by type
- View Customers by stores
- View products by stores
- filter Orders by status
- Multisite wordpress support



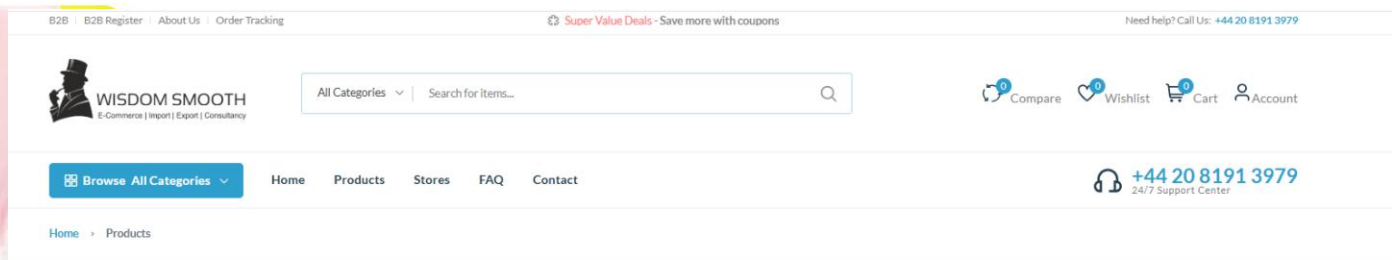
**WOO** **COMMERCE**



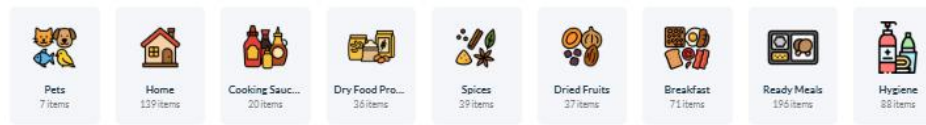
**shopify**



# C2C, B2C E-Commerce Web Site



## Top Categories



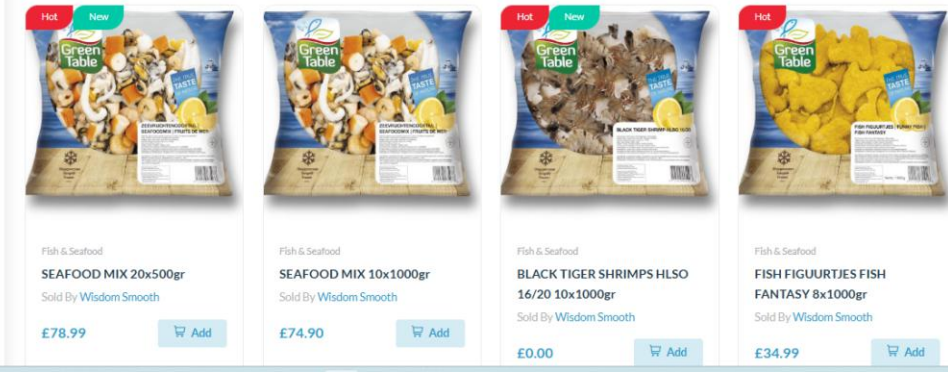
## Categories

- Pets 7
- Home 139
- Cooking Sauces & Syrups 20
- Dry Food Products 36
- Spices 39
- Dried Fruits 37
- Breakfast 71
- Ready Meals 196
- Hygiene 88

Filters

We found 1186 items for you!

Show: 35 Sort by:



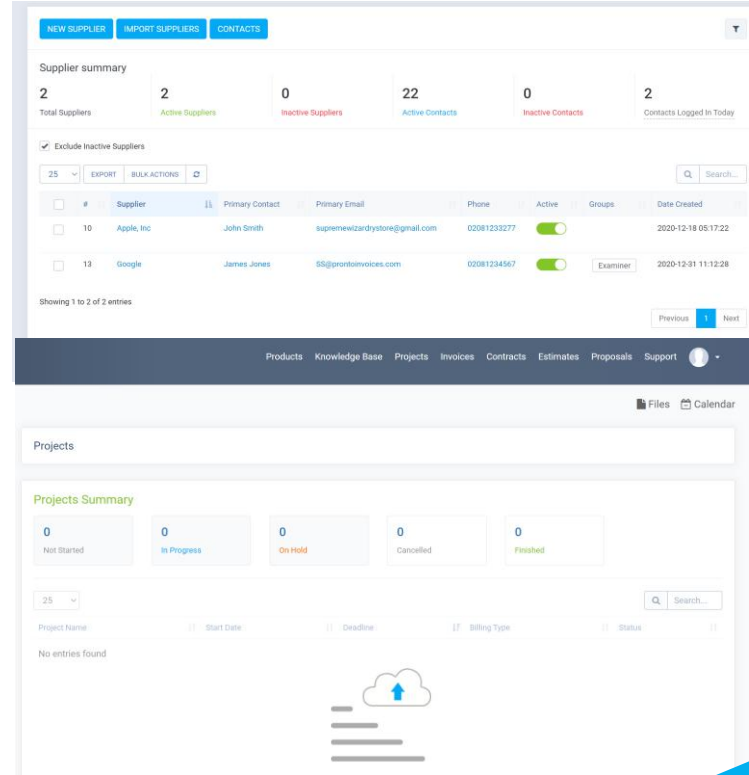
## Popular Products



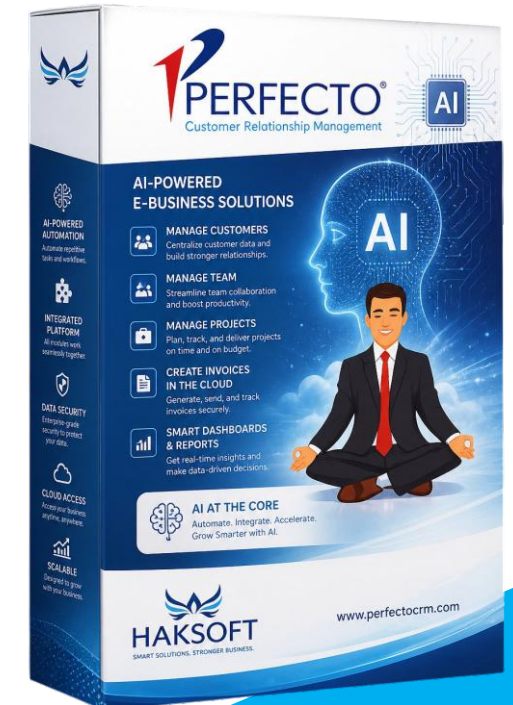
## Supplier Management module for Perfecto CRM

Supplier relationship management is the discipline of strategically planning for, and managing, all interactions with third party organizations that supply goods and/or services to an organization the objective of SM is to maximize the value of those interactions. Know your supply chain, know your risk, build relationships and partners to conduct business transactions. Use SM module to build a list of suppliers all in Perfecto.

- Stay on top of business and manage your supplier's relationships, all from Perfecto CRM.
- Assign suppliers to specific staffs of your team and let them manage the relationship.
- Allow suppliers to collaborator in the supplier portal
- Make notes, statements, invoices, Credit note, estimate, tickets, contracts, projects, task

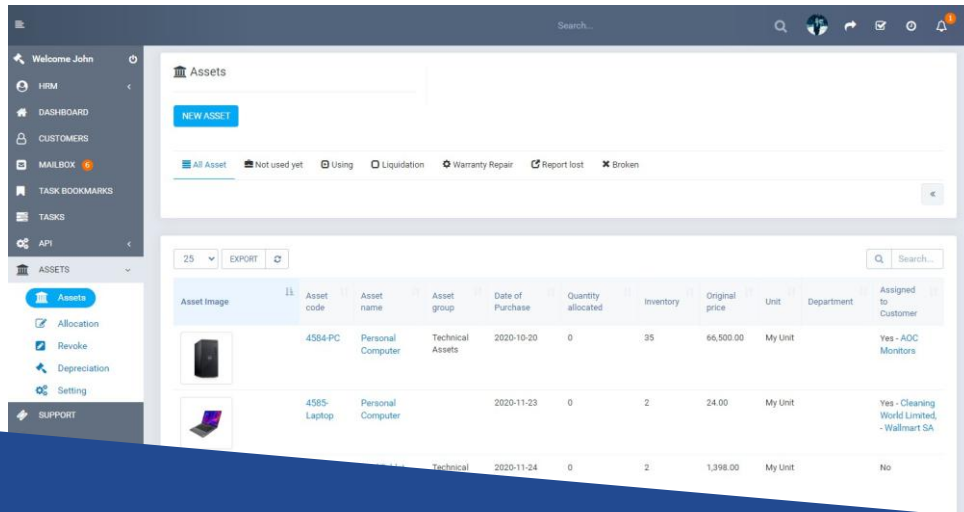





The screenshot shows the 'Supplier Management' interface in Perfecto CRM. At the top, there are tabs for 'NEW SUPPLIER', 'IMPORT SUPPLIERS', and 'CONTACTS'. Below this is a 'Supplier summary' dashboard with six metrics: Total Suppliers (2), Active Suppliers (2), Inactive Suppliers (0), Active Contacts (22), Inactive Contacts (0), and Contacts Logged in Today (2). A table below the summary lists suppliers with columns for #, Supplier, Primary Contact, Primary Email, Phone, Active status, Groups, and Date Created. Two suppliers are listed: Apple, Inc. and Google. At the bottom of the interface, there is a 'Projects' section with a 'Projects Summary' dashboard showing metrics for Not Started, In Progress, On Hold, Cancelled, and Finished. Below this is a table for project entries, which currently shows 'No entries found'.



## Assets Management module for Perfecto CRM - Organize company and client assets

Assets Management Module for Perfecto CRM, is a module that provides the ability of managing company's assets inside Perfecto's dashboard. You will be able to separate your assets based on groups/locations/units and assign them to staff members. Check the next section of this description, for a complete list with functionality actions.



Asset Image	Asset code	Asset name	Asset group	Date of Purchase	Quantity allocated	Inventory	Original price	Unit	Department	Assigned to Customer
	4584-PC	Personal Computer	Technical Assets	2020-10-20	0	35	66,500.00	My Unit		Yes - ADC Monitors
	4585-Laptop	Personal Computer		2020-11-23	0	2	24.00	My Unit		Yes - Cleaning World Limited, - Walmart SA
		Technical		2020-11-24	0	2	1,398.00	My Unit		No

Assets Management Module contains the following functionality:

- Create assets (editing/removing it aswell)
- Create customer-based Assets, corporate-only assets and mixed ones
- Revoke an asset
- Add additional assets in existing asset
- Assign an asset on a specific staff user
- Transfer assets between users
- Report an asset loss
- Report an asset as a broken one
- Liquidation record of an asset
- Warranty record of an asset
- Allocated Assets list
- Revoked Assets list
- Deprecated Assets list
- Ability to separate assets based on unique units, asset groups and asset locations (listing aswell)
- Ability to add images to your assets (publicly accessible, through changeable constant for uploadsdir)



# Inventory/Warehouse Management for Perfecto CRM

Inventory Management Module is a tool that allows you to track goods across your business's supply chain. It optimizes the entire spectrum spanning from order placement with your vendor to order delivery to your customer, mapping the complete journey of a product. Through accurate tracking of goods, businesses can minimize waste, analyze trends, and make better investment decisions.

**Stock export manage**

**EXPORT OUTPUT SLIP**

25 EXPORT

Search...

Stock export code	Customer code	Customer name	to	Address
+ XK01	#C_001	Company X.C.o/td	Bob	

Showing 1 to 1 of 1 entries

Previous 1 Next

**Export output slip**

Customer name: Company X.C.o/td

to: Bob

Address:

#	Commodity Code	Commodity Name	Warehouse name	Unit name	Quantity	Unit price
0	#CPT001		Noida	Set	2	20,000,000.00
1	#LAP002		Noida	Set	2	18,590,000.00

HUNG

**APPROVED**

**Stock received information**

**STORE INPUT SLIP**

Days: 20 Month: 11 Year: 2021 Voucher number: N021

Deliver name: David No: N021

STT	Commodity Code	Commodity Name	Unit name	Quantity	Unit price	Total payment
0	#CPT001		Set	10	15,000,000.00	150,000,000.00
1	#LAP002		Set	10	15,000,000.00	150,000,000.00

Amount of: 300,000,000.00(IND)

Deliver name: (Sign, full name) Blocker: (Sign, full name) Chief accountant: (Sign, full name)

HUNG

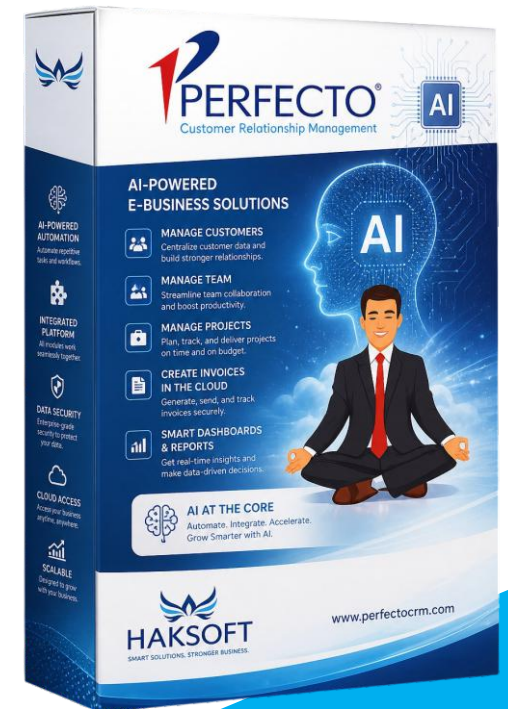
**APPROVED**

**Stock received docket detail**

Commodity Code	Description	Warehouse	Unit	Quantity	Unit price	Tax %	Order money	Tax money
1	#CPT001_001 Improm 3705	Noida	Set	10	15,000,000	0	150,000,000	0
2	#LAP002_001 Improm 7285	Noida	Set	10	15,000,000	0	150,000,000	0

Total tax money: 0.00 Total goods money: 300,000,000.00

Value of inventory: 300,000,000.00 Total payment: 300,000,000.00



# Inventory/Warehouse Management for Perfecto CRM

WISDOM SMOOTH
Search...
🔍 📧 🌐 🔄 📧 🔔

Welcome Abdullah
DASHBOARD
POS

INVENTORY

Items

- Inventory receiving voucher
- Stock export
- Internal delivery note
- Loss & adjustment
- Warehouse
- Inventory history
- Report
- Settings

- OMNI SALES
- SALES
- PURCHASE
- CUSTOMERS
- SPREADSHEET ONLINE
- POTENTIAL CUSTOMER
- APPOINTLY
- CUSTOMER LOYALTY
- LEAD MANAGER
- COMMISSION
- EXPENSES

### Commodity List

ADD
IMPORT ITEMS
IMPORT OPENING STOCK

Tags








Alert

Warehouse

Item

25
EXPORT
BULK ACTIONS
EXPORT SELECTED ITEM
PRINT BARCODE
PRINT RETAIL
PRINT WHOLESALE
PRINT BARBER
PRINT PARTNER
🔄

Search...

<input type="checkbox"/>	Images	Commodity Code	Commodity Name	SKU Code	Group name	Warehouse name	Tags	Inventory	Unit name	Purchase Price	Rate	Barber Price	Wholesale Price	Partner Price	Vip Wholesale Price	Wholesale Web Price	Tax	Status	Box Number
<input type="checkbox"/>		PCRE-075	PREDO CARE HAND, FACE & BODY CREAM 75 ML *48 PCS	PCRE-075	Salon & Barber Products	Ana Depo: ( 10000 )		0	Box	0.34	0.62	0.00	0.48	0.41	0.40	0.53	NO VAT	Active	48
<input type="checkbox"/>		MU-25'S	MAKE UP REMOVER WIPES	MU-25'S	Salon & Barber Products	Ana Depo: ( 10000 )		0	Box	0.21	0.38	0.00	0.30	0.25	0.25	0.33	NO VAT	Active	144
<input type="checkbox"/>		HSY-5	PREDO CARE LIQUID HAND SOAP 500 ML / YASMINE	HSY-5	Salon & Barber Products	Ana Depo: ( 10000 )		0	Box	0.45	0.80	0.00	0.62	0.53	0.52	0.69	NO VAT	Active	12
<input type="checkbox"/>		HSS-5	PREDO CARE LIQUID HAND SOAP 500 ML / STRAWBERRY	HSS-5	Salon & Barber Products	Ana Depo: ( 10000 )		0	Box	0.45	0.80	0.00	0.62	0.53	0.52	0.69	NO VAT	Active	12
<input type="checkbox"/>		HSR-5	PREDO CARE LIQUID HAND SOAP 500 ML / ROSE	HSR-5	Salon & Barber Products	Ana Depo: ( 10000 )		0	Box	0.45	0.80	0.00	0.62	0.53	0.52	0.69	NO VAT	Active	12
<input type="checkbox"/>		HSP-5	PREDO CARE LIQUID HAND SOAP 500 ML / PEACH	HSP-5	Salon & Barber Products	Ana Depo: ( 10000 )		0	Box	0.45	0.80	0.00	0.62	0.53	0.52	0.69	NO VAT	Active	12
<input type="checkbox"/>		HSO-5	PREDO CARE LIQUID HAND SOAP 500 ML / OCEAN	HSO-5	Salon & Barber Products	Ana Depo: ( 10000 )		0	Box	0.45	0.80	0.00	0.62	0.53	0.52	0.69	NO VAT	Active	12

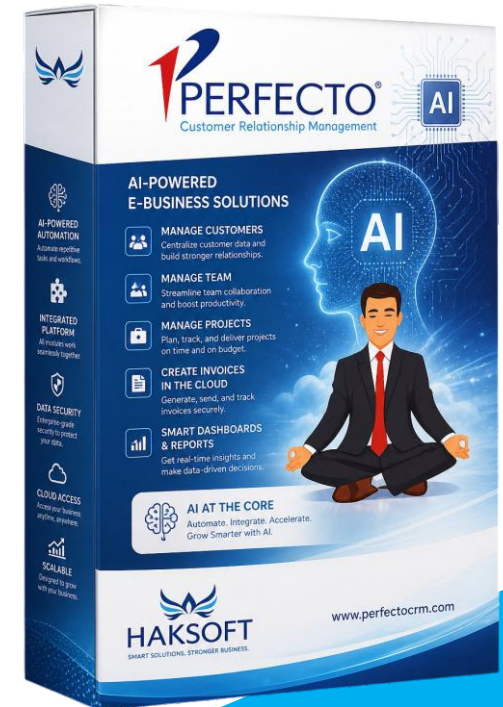
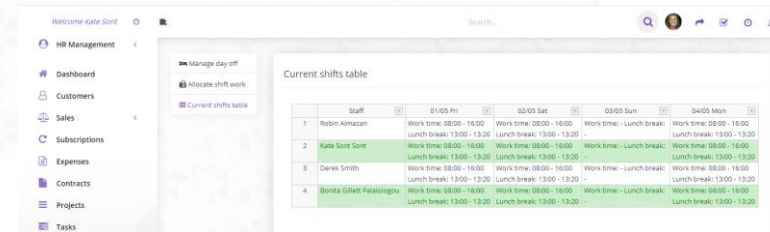
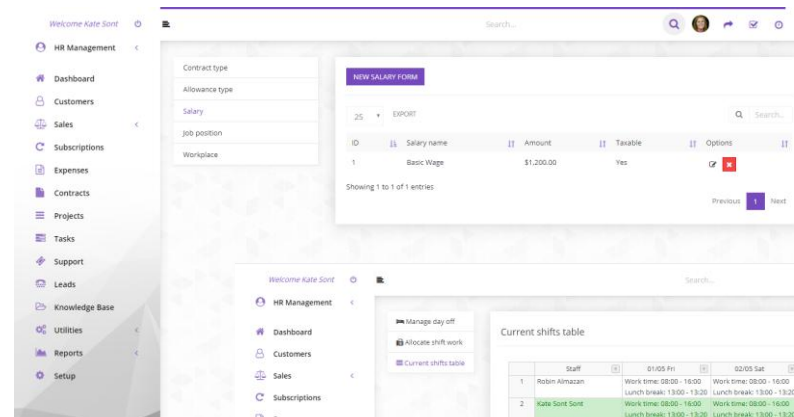
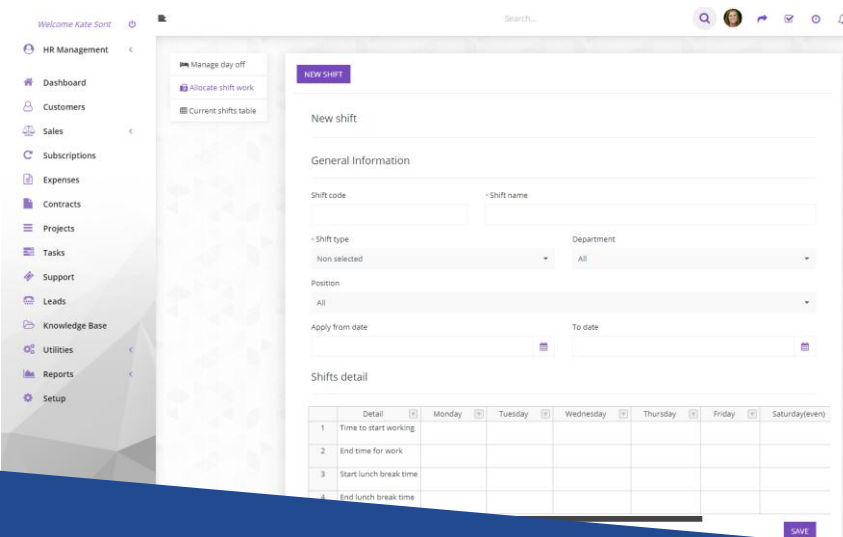
WISDOM SMOOTH LTD
Online: 0

- Hikmet Düzgün
- Ömer Özel
- Gülistan Aydın

# Human Resources Management - HR module for Perfecto CRM

This is the first complete Human Resources Management (HRM) solution for Perfecto.

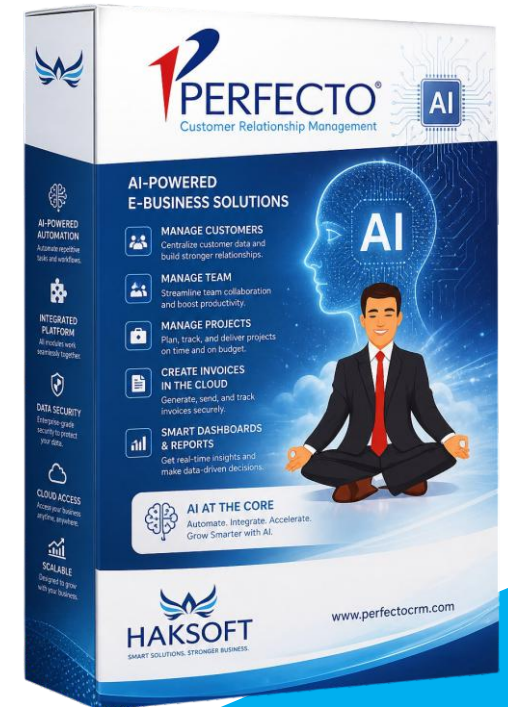
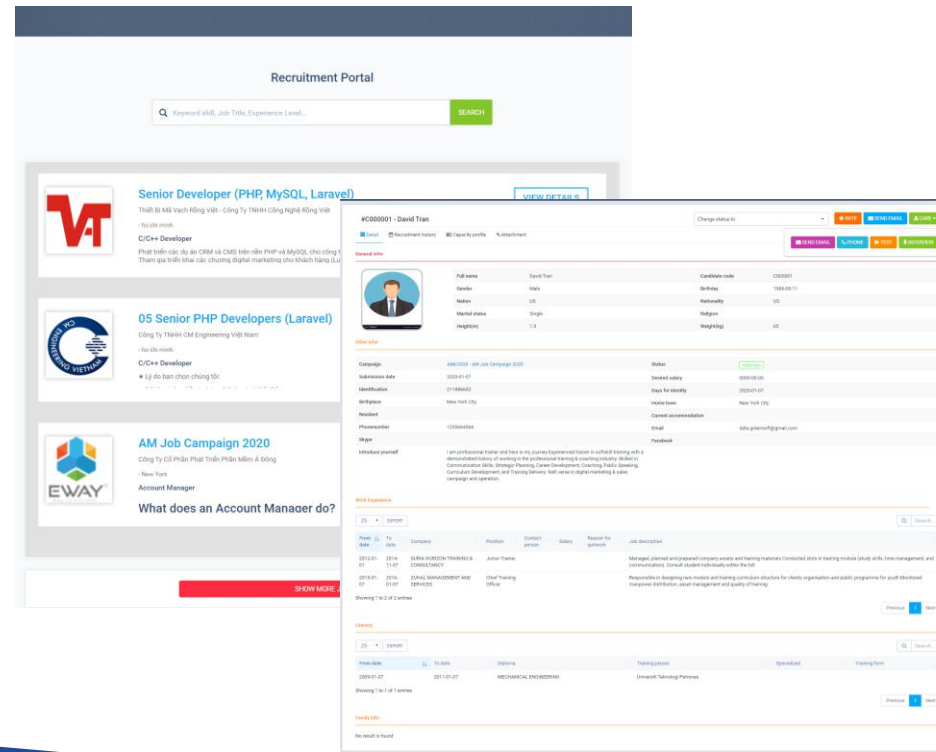
Human Resources Management module for Perfecto CRM, helps companies save time and manage their Human Resources directly inside their dashboard.



# Recruitment Management for Perfecto CRM

Recruitment Module for Perfecto CRM, is a set of tools designed to automate and manage your organization's recruiting and staffing operations. From posting your jobs to keeping applicants connected and engaged throughout, Recruitment Module lets you manage your entire recruiting process.

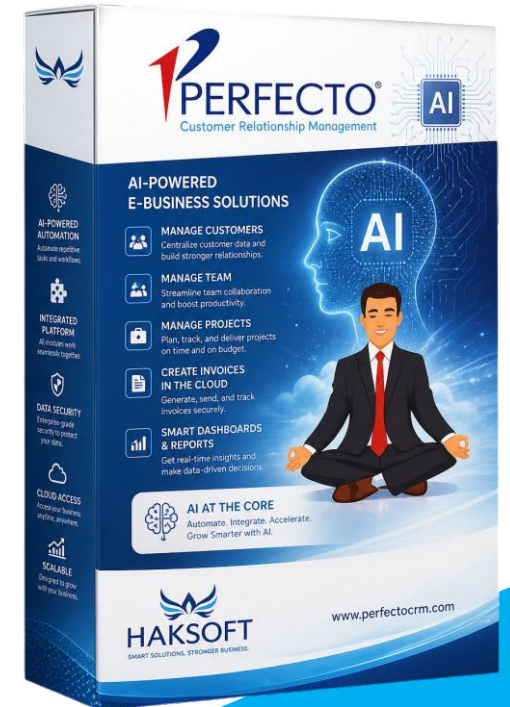
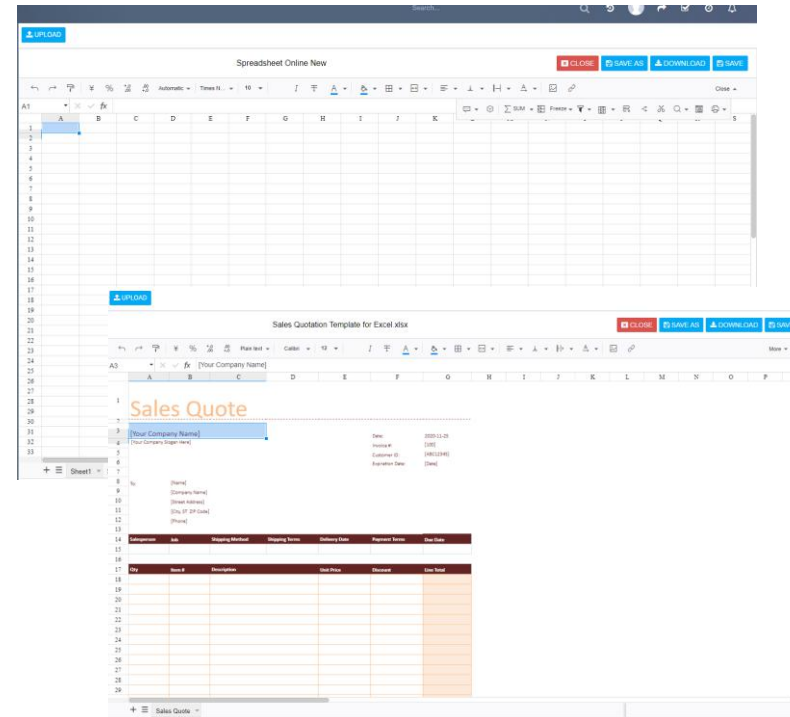
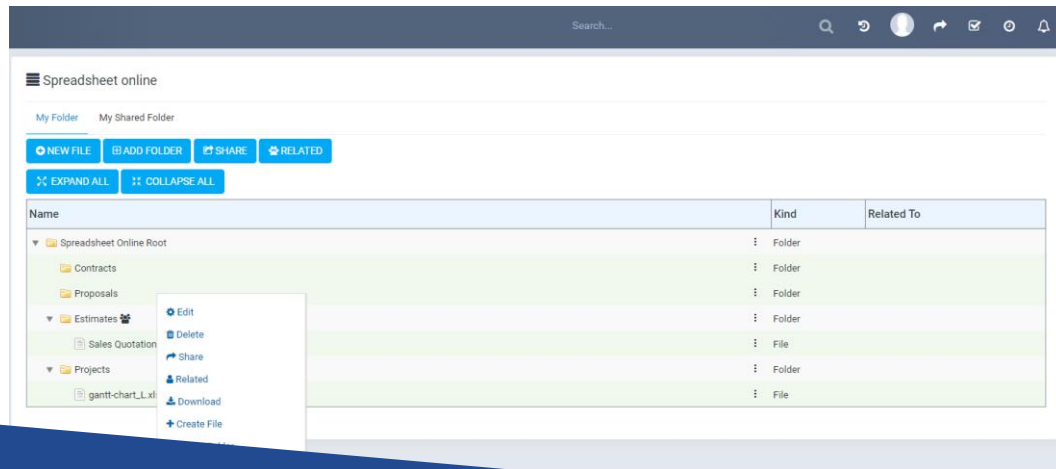
Reduce routine tasks such as scheduling interviews by automating your recruitment software and free up your schedule for more pressing activities. Online recruiting management systems create a one-stop application process for job seekers. With the help of an applicant tracking system and candidate relationship management, a recruiter can increase his or her client database and provide an overall better candidate experience.



# Spreadsheet Online for Perfecto CRM

Spreadsheet Online Module is a powerful spreadsheet editor that lets you do pretty much everything you can do with contemporary spreadsheet software like Excel.

This module helps you reach your goals and lead you to make better decisions. There's nearly nothing you can't track and manage using this module.



# Account Planning module for Perfecto CRM

## Strategic plans for your clients

Account Planning Module for Perfecto CRM, is a strategic account planning tool, which, through a customer-centric approach to identifying priority accounts capturing and analysing critical information, allows you and your staff members to develop a strategy to expand and grow existing customer relationships.

### B. Financial

	Year	revenue	Traffic
1	2019	100.000	

### C. Marketing Activities

1. Do you know Client's current partners?

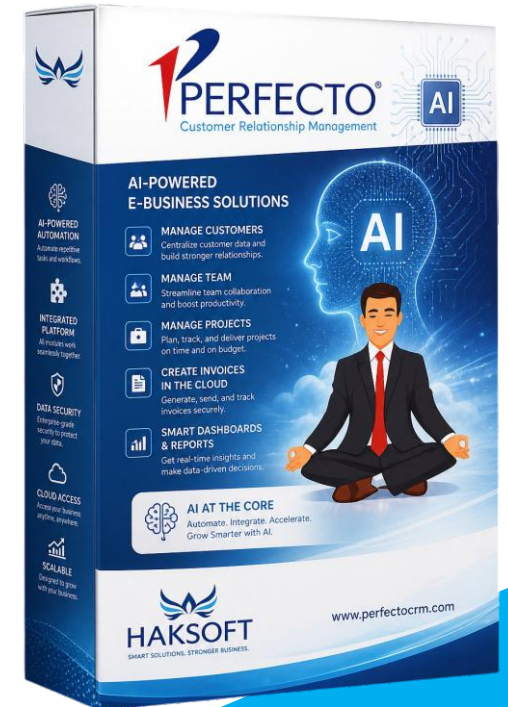
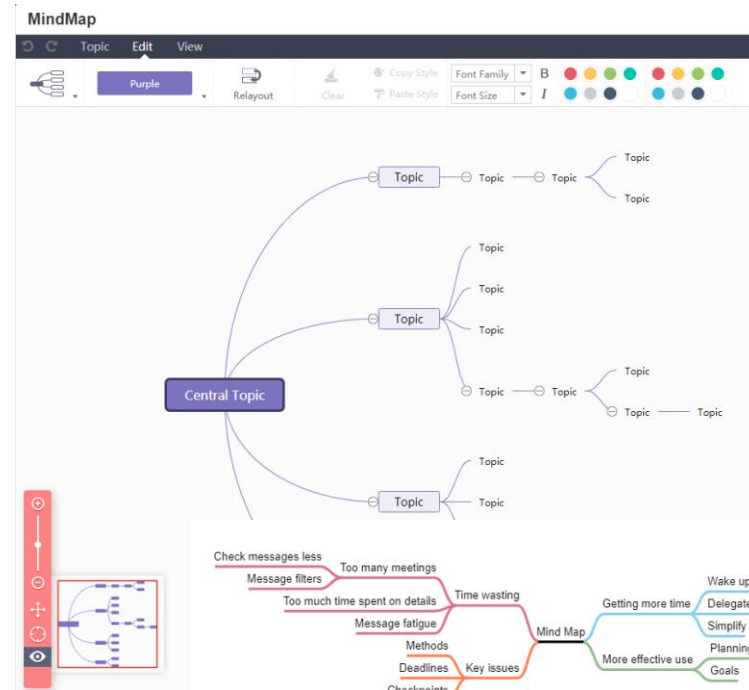
Lead generation

Low

2. Last year/ current marketing activities?

Select all Clear

Upsale

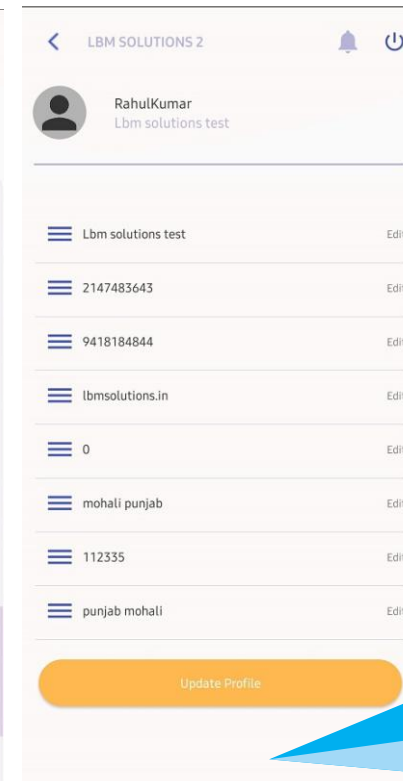
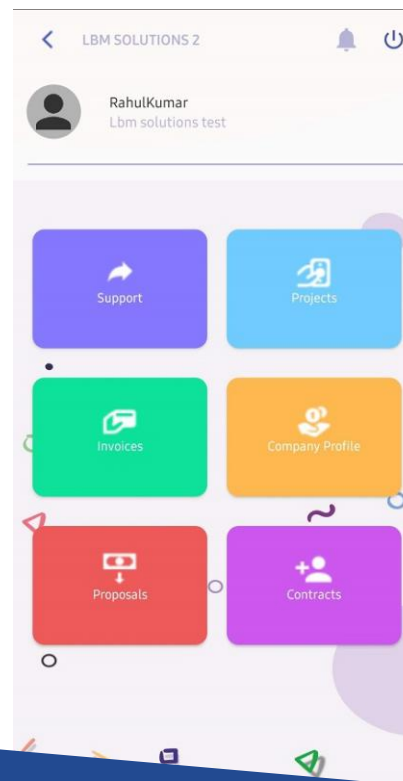


**AVAILABLE NOW**

## CLIENT APP FOR PERFECTO CRM

### CLIENT APP

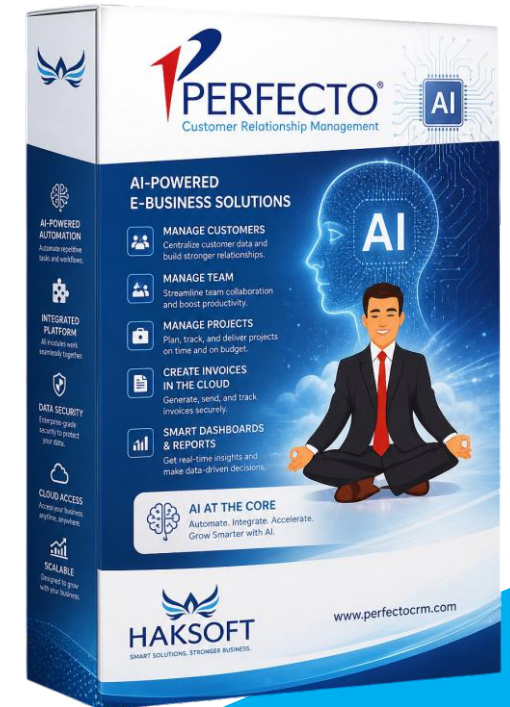
Our App New Client App is Now Available For Buy. This app is made using flutter. So you can run this app on android and IOS.



## Facebook Leads synchronization module for Perfecto CRM



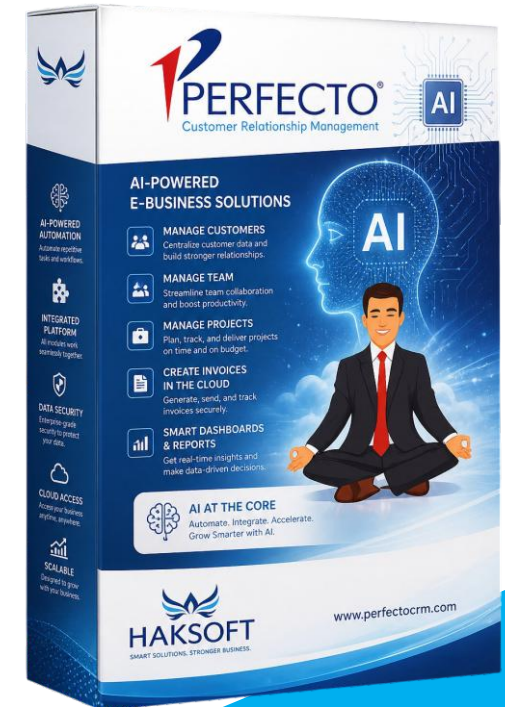
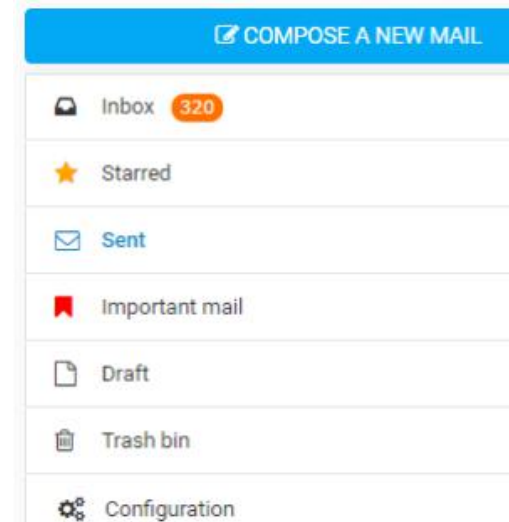
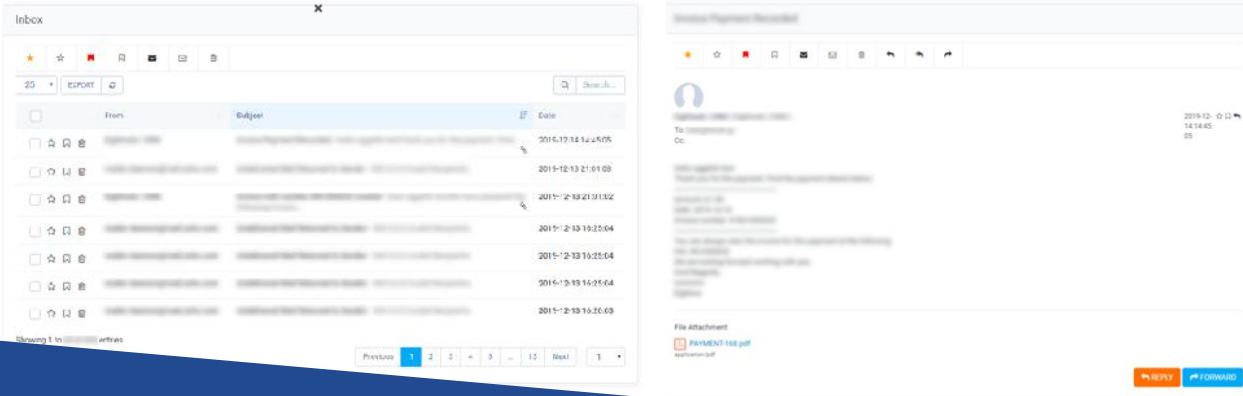
Facebook Leads Integration Module for Perfecto CRM, is a module that enables you to sync your Facebook Leads through your page's forms with PerfectoLeads. It uses Facebook oAuth connect in order to grant access to your Facebook Pages, it allows custom fields to be synced between Perfecto and Facebook and you can subscribe to multiple pages of yours.



## Mailbox - Webmail based e-mail client module for Perfecto CRM

This module integrates a Mailbox client at your Perfecto CRM's dashboard.

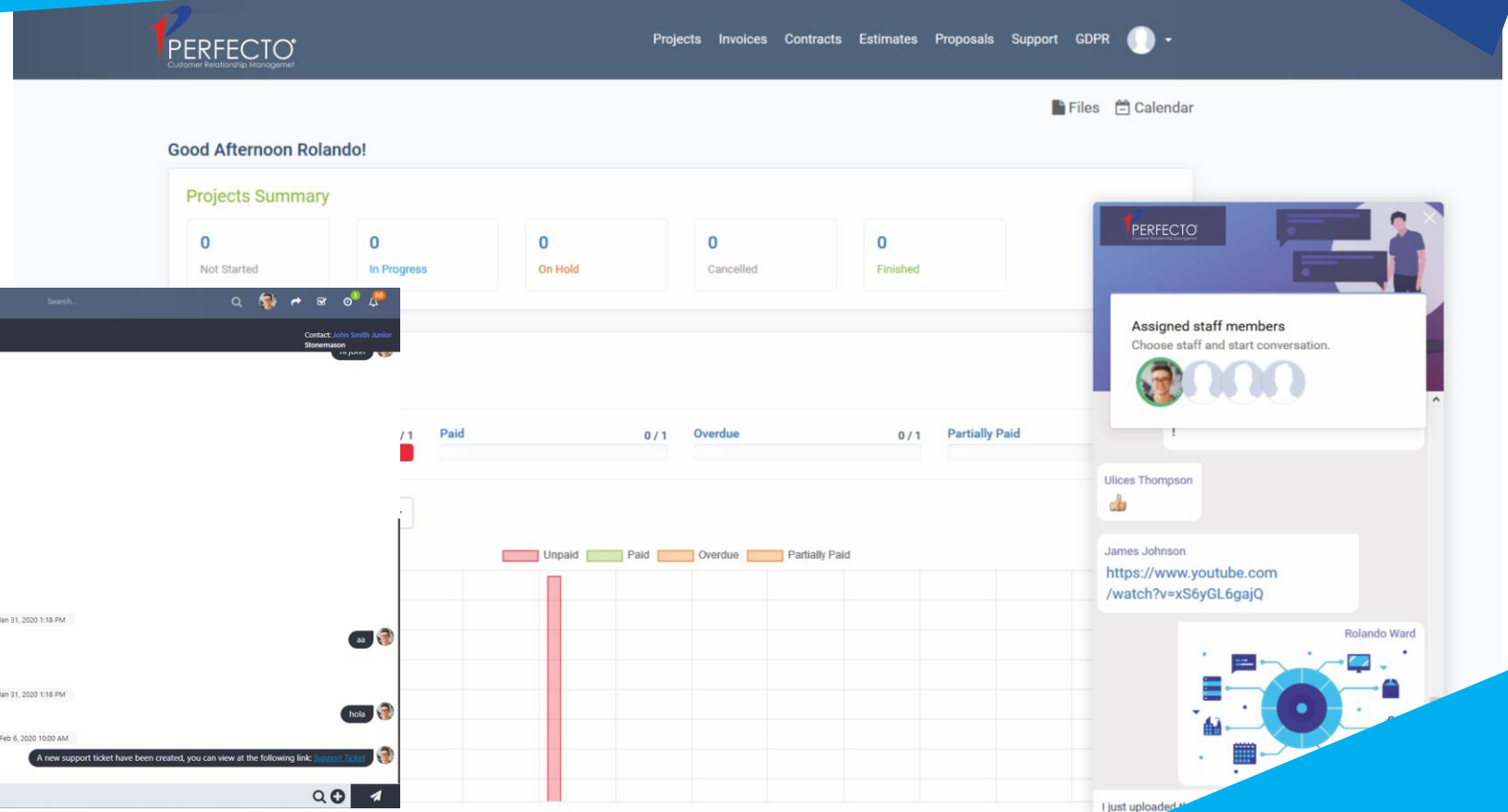
By enabling, you will be able to allow your staff members to send/receive/draft/organize e-mails of their IMAP accounts, inside their dashboard.





# CHAT ADD-ON

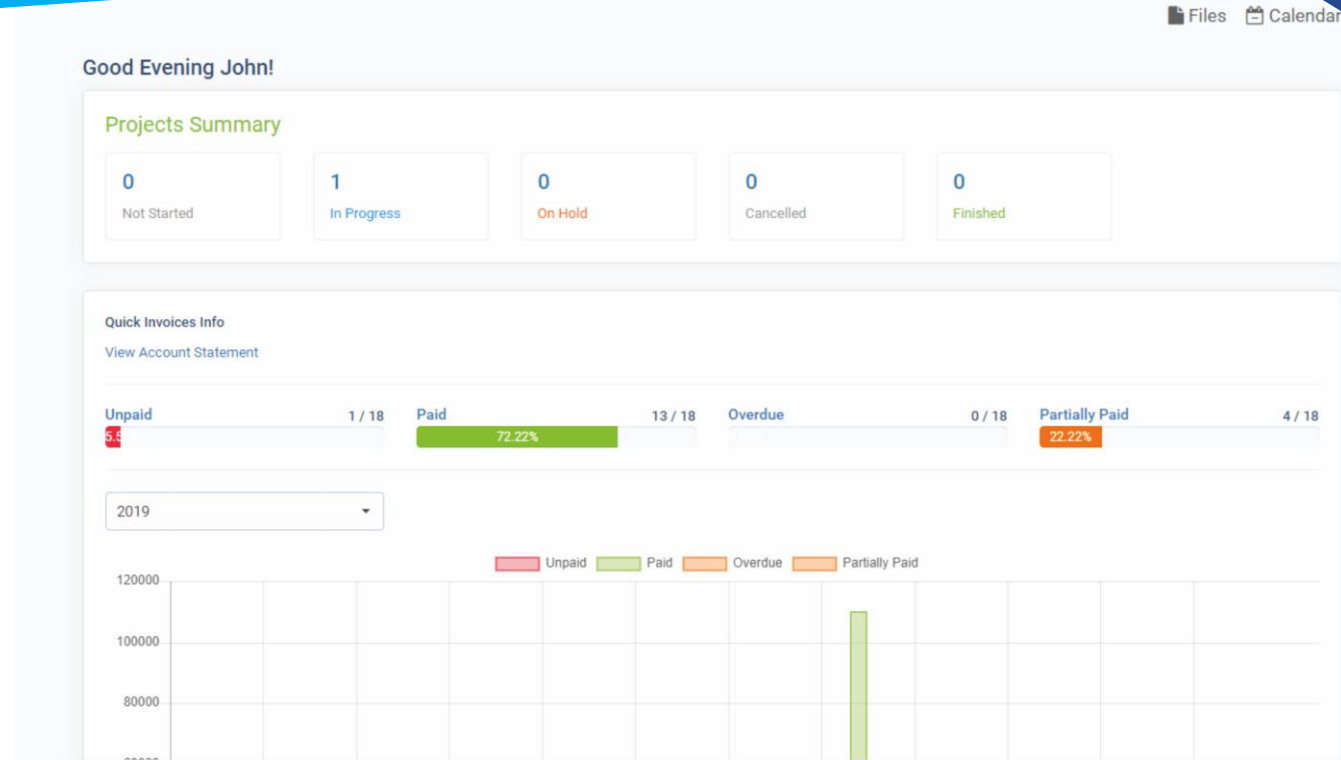
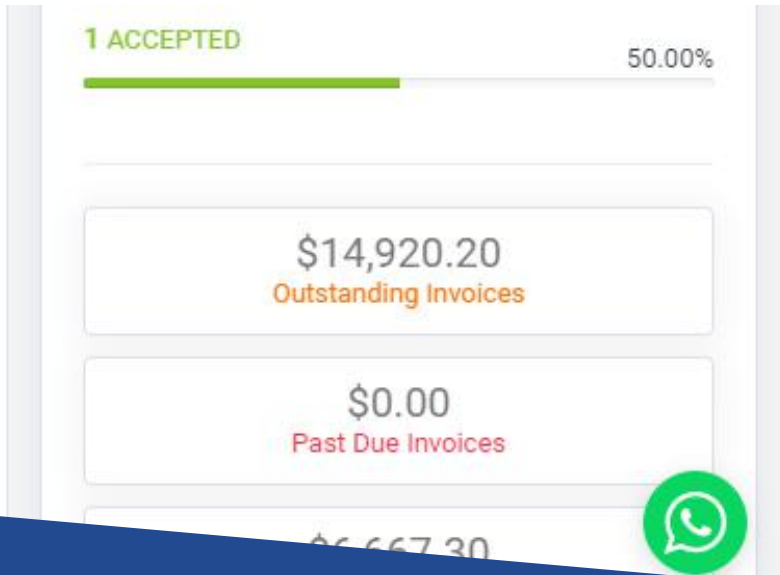
Perfecto CRM Powerful Chat a real time experience add on. Employees, Clients, Groups



The screenshot displays the Perfecto CRM interface. At the top, there is a navigation bar with links for Projects, Invoices, Contracts, Estimates, Proposals, Support, and GDPR. Below this is a 'Good Afternoon Roland!' greeting. The main area features a 'Projects Summary' with five status boxes: Not Started (0), In Progress (0), On Hold (0), Cancelled (0), and Finished (0). Below the summary is a bar chart with a legend for Unpaid (red), Paid (green), Overdue (orange), and Partially Paid (yellow). A chat window on the left shows a conversation with 'Customer: Veum Group' and a list of staff members. A pop-up on the right titled 'Assigned staff members' allows users to choose staff and start a conversation, listing Ulices Thompson and James Johnson with a YouTube link.

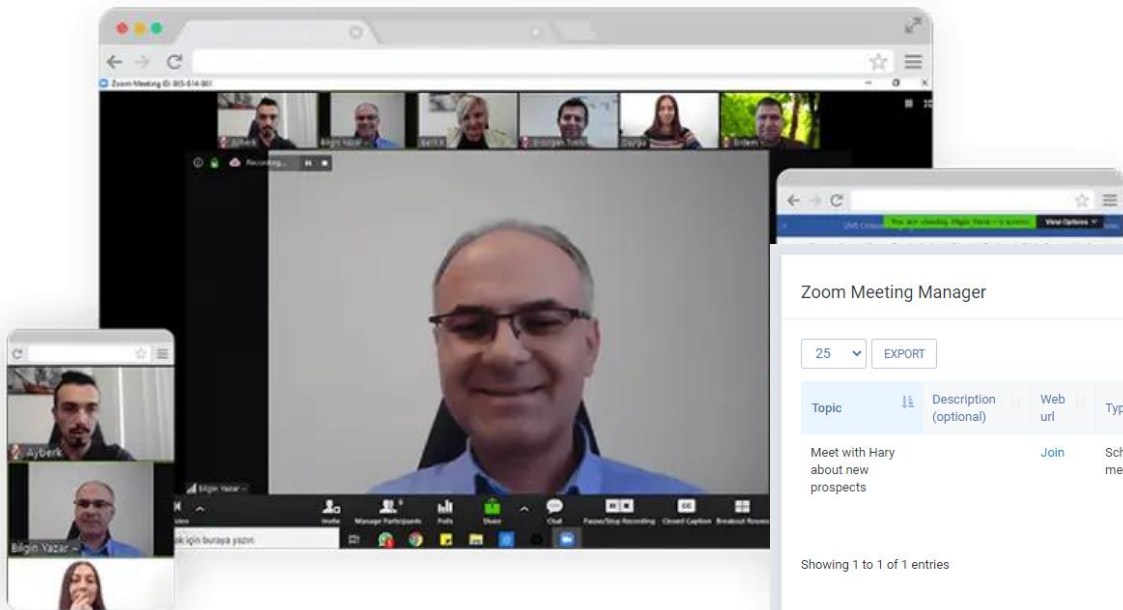
# WHATSAPP MODULE

WhatsApp Module for Perfecto CRM, is a module that allows you to integrate the famous WhatsApp contact button, onto your Customers Area and/or Administration area of Perfecto CRM.





**zoom**  
Video Conferencing



Meeting Information

Topic: Meet with Hary about new prospects

Description / Agenda:

Status: **Started**

Start Time: 01.10.2020 6:00 AM

Duration: 90

Time Zone: America/Costa\_Rica

Password: aLZA1c

If this is not the password you set when creating the meeting it means you are using a basic free account and password will be always set, but your registrants / participants to the meeting will not be required to enter the password even if it is set by default. Unless this is the password you set when creating the meeting all members will be required to enter the password in order to join the meeting.

Meeting Type: Scheduled meeting

Host Video: No

Participant Video: no

Join Before Host: No

Mute Upon Entry: No

Waiting Room: No

Meeting Authentication: No

[Join URL \(Web\)](#)

[BACK TO MEETINGS](#)

Zoom Meeting Manager

[SCHEDULE A MEETING](#)

25 EXPORT Search...

Topic	Description (optional)	Web url	Type	Start Time	Time Zone	Created At	App url
Meet with Hary about new prospects		Join	Scheduled meeting	01.10.2020 6:00 AM	America/Costa_Rica	26.09.2020 3:19 PM	Join

Showing 1 to 1 of 1 entries

Previous 1 Next

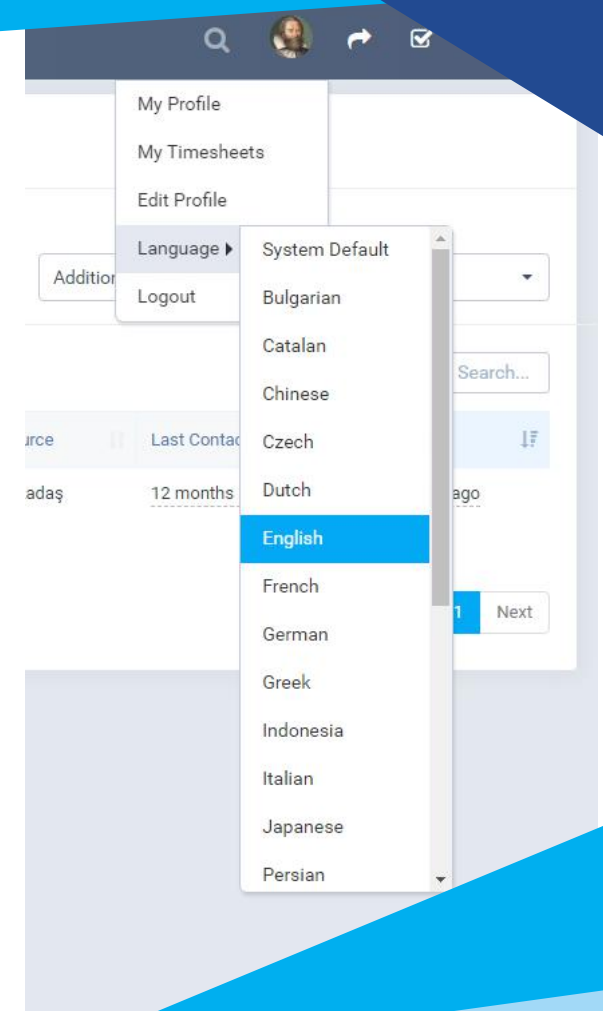
Viewing notes for meeting with topic: Meet with Hary about new prospects

File Edit View Insert Format Tools Table

Verdana 12pt

- Notify all staff that meeting will be with 2 or more people.
- Take John with the team
- After meeting is finished get all to dinner
- See new ideas from meeting

ul » ll



## MULTI-LANGUAGE OPTION

There are 23 language options.

## INTEGRATED ERP & E-COMMERCE SOFTWARE



## INTEGRATED SMS & E-MAIL SOFTWARE



Clickatell



MSG91



twilio



Bulutfon



sendinblue

## Government Trading Systems Integration



Companies  
House



HM Revenue  
& Customs



**T.C. HAZİNE VE  
MALİYE BAKANLIĞI**

## Other Systems Integration



sage



intuit  
quickbooks.



xero



SAP

## Artificial Intelligence Integration



## INTEGRATED PAYMENT GATEWAY



PayU



stripe



2CC 2CHECKOUT.COM



Skrill



PAYTR



PayPal



Authorize.Net



Mollie



bitpay



Flutterwave



GOCARDLESS



myPOS



iPay



shopier

## HAPPY CUSTOMERS - FMCG - Cosmetics



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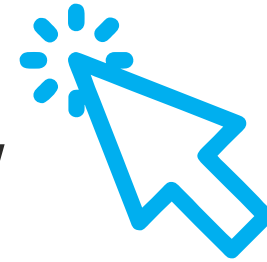
<https://www.perfectocrm.com/crm/authentication/register>



# LIVE DEMO

## Cloud CRM Solution

<https://perfectocrm.com/demo/admin/>



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