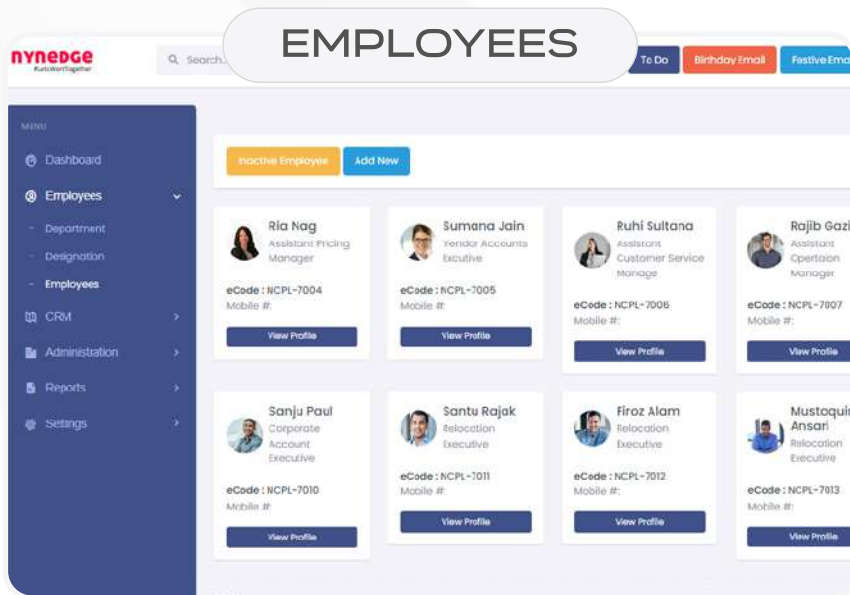


RELOCATE  
**CRM**  
SOFTWARE

PROVIDING  
A  
**FLUID**  
EXPERIENCE

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Onboarding employees are the key feature of your CRM SOP software. Until you add your team members the system won't work. It does not matter if you have 2 team members in 2000, a team member has to work. The system has been designed in such a way that any small medium or big enterprise can use the same.

- ✓ Employee personal details mapped with department and designations
- ✓ Employee can log in to their own system and work
- ✓ Employee address and communication can be maintained
- ✓ Employee educational information can be recorded

The CRM SOP software segregated the client type into B2B and B2C. The relocation industry has two target customers yet some companies focus on B2B or B2C and some focus on both. Hence the system will allow you to manage the same. This we call customer onboarding.

- ✓ Grid of B2B and List of B2C customers
- ✓ Add new customers as per customer type which is B2B and B2C
- ✓ Edit and update customer information
- ✓ Assign the designated team member to the client

## CUSTOMERS



## LEADS



Once your customer is on boarded you can get connect with them personally or by phone or email to create your lead. The lead will cover a few vital things, which is customer information, origin and destination, article information, handyman support, and insurance. Your team assignment will start now while you create leads.

- ✓ When you click on the “Add Lead” from customer system will take info automatically
- ✓ Have the option to select your moving type which is Local, Domestics, Commercial, or International as well as source of Leads
- ✓ Have to enter origin and destination information with address, city, state, and country. Also, you must enter the floor number, lift

- availability, and Preferred date of packing, moving, and delivery.
- ✓ Have the option to enter articles like TV, Washing machine, bed, tables, computer, and so on. A pre-defined list will be available in CFT format. You can enter your additional information too. The system is open for the same.

On the Survey section, the system will allow a separate view where you can easily identify the status of each customer whether a survey is done or a survey is required.

- ✓ The card view classified option will give visibility of each customer's status like Survey done, survey required, address not found, address not found and survey declined.
- ✓ Survey required you can review the list of surveys that you need to execute
- ✓ Survey team can edit the lead articles if there are any changes while survey.
- ✓ Survey done will give one-click Quote Generate

## SURVEY



## QUOTATION

On the Quote list, you can review the quote you have generated and sent via email automated. You will option to quote approval by simply one click to change the status.

- ✓ Select branch because you may have multi GST, hence you can generate quote from any branch from respective GST enabled.
- ✓ One click to get customer details in your create quote, no need for any feed data Automated Quote generation.
- ✓ Discount option will help you give any off kind of deduction. You can also give a discount on Figures or Percentage.
- ✓ Quote with CFT auto feed, Enter service details from the pre-defined service list and Auto calculator.
- ✓ Tax options with GST, RCM, and Not Applicable and Send Quote PDF via email and SMS.
- ✓ Pre-defined Terms that are too editable from your system as per your company terms. You also edit the same at the time of quote send.



## BOOKINGS



The bookings will give you the confirmed customer information who already approved your quotation and the list of customers can be viewed in the same section.

- ✓ You can accept after getting a final confirmation from the customer else you can cancel the same.
- ✓ Once canceled the quotation will be canceled automatically.
- ✓ You can view the full details with customer information, origin and destination details, article information, and handyman details.
- ✓ Ability to print out the same and download it as PDF.



## TRANSITS

On Transit will give you detailed information on accepted bookings in two classified manners that is “UP COMING TRANSITS/JOBS” and “ON TRANSITS”.

- ✓ The app will allow auto segmentation of your upcoming and on transit On Transits, you are able to update the location
- ✓ Ability to assign your TRANSPORTERS, HANDYMANS AND VENDORS
- ✓ You can update the status of your shipment and customer get notified
- ✓ “Service Deliver Soon” Notifications also there. Once completed mark the status “Service Delivered”



## INVOICE



Once Service Delivered mark you will able to see all lists in the invoice section and you can follow the steps

- ✓ Upload invoice by customer name Quote number and amount
- ✓ Customer can download the invoice from the link you sent
- ✓ Mark and send the invoice via email and SMS

## VENDOR

The vendor manager will help you list your associates and see all information at a glance. You can check all information and location as well as bank details.

- ✓ Vendor Category separation such as - Transporters, Handyman, Origin Vendor and Destination Vendor
- ✓ You can add Vendors with all information like name, contact info, email, bank details, location, and so on.
- ✓ The system will ask for vendor information before you set up your transits on upcoming jobs.



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