

## **CRM Demo Document**

CRM Screenshots Demo - Shadstone Limited

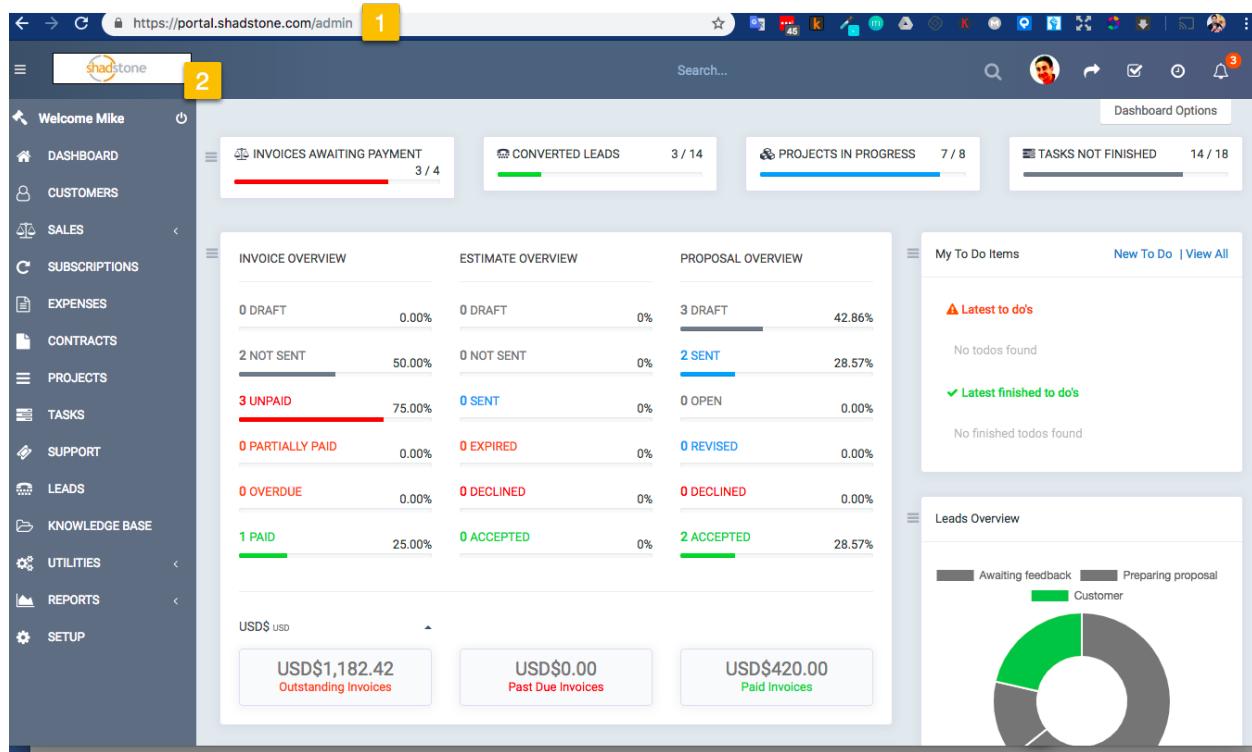
<b>Your Own Branding (Website + Logo)</b>	<b>1</b>
<b>Customer (Client) Database &amp; Logins</b>	<b>2</b>
<b>Expense Management</b>	<b>3</b>
<b>Create Customer/ Client Contracts</b>	<b>4</b>
<b>Project Status</b>	<b>4</b>
<b>Lead Management</b>	<b>5</b>
<b>Powerful Reporting</b>	<b>6</b>
<b>Even More Functionality Possible</b>	<b>6</b>

## **Your Own Branding (Website + Logo)**

We feel it is important to have your own website URL for staff, partners, clients to see.

1. Your own custom subdomain URL (ie portal.mywebsite.com or crm.mywebsite.com)
2. Your own company logo on online system, email notifications, reports, and proposal pdfs.

## CRM Demo Document



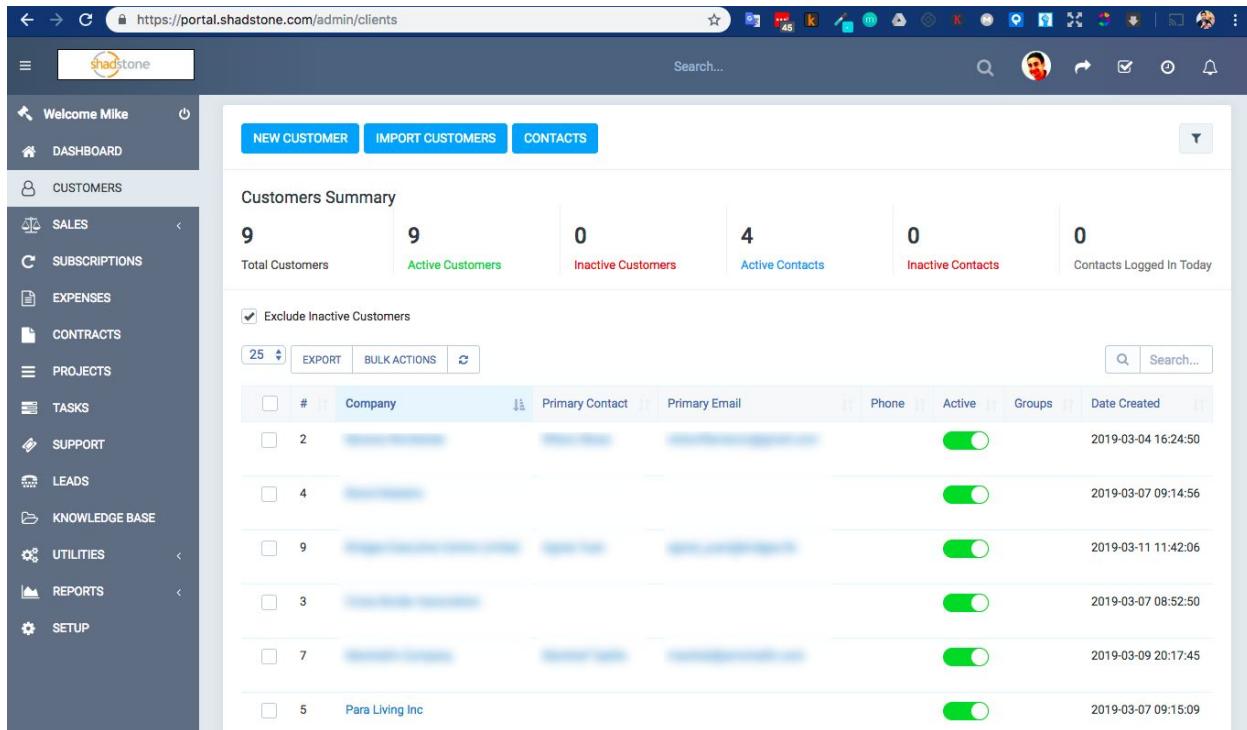
The screenshot shows a CRM dashboard with a dark blue header and a light blue sidebar. The header includes a search bar, user profile, and dashboard options. The sidebar on the left lists various modules: Welcome Mike, Dashboard, Customers, Sales, Subscriptions, Expenses, Contracts, Projects, Tasks, Support, Leads, Knowledge Base, Utilities, Reports, and Setup. The main content area is divided into several sections:

- Top Metrics:** INVOICES AWAITING PAYMENT (3 / 4), CONVERTED LEADS (3 / 14), PROJECTS IN PROGRESS (7 / 8), and TASKS NOT FINISHED (14 / 18).
- Invoice Overview:** Shows counts and percentages for Draft, Not Sent, Unpaid, Partially Paid, Overdue, and Paid invoices.
- Estimate Overview:** Shows counts and percentages for Draft, Not Sent, Sent, Open, Revised, Declined, and Accepted estimates.
- Proposal Overview:** Shows counts and percentages for Draft, Sent, Open, Revised, Declined, and Accepted proposals.
- USD\$ USD:** Summary of outstanding invoices (USD\$1,182.42), past due invoices (USD\$0.00), and paid invoices (USD\$420.00).
- My To Do Items:** Lists latest to do's (no todos found) and latest finished to do's (no finished todos found).
- Leads Overview:** A donut chart showing the distribution of leads by status: Awaiting feedback (grey), Preparing proposal (grey), and Customer (green).

## Customer (Client) Database & Logins

Keep all your customer (client) data in one dashboard. A customer can login to certain areas of your CRM with a username and passwords. To see projects, tasks, and download reports.

## CRM Demo Document



Customers Summary

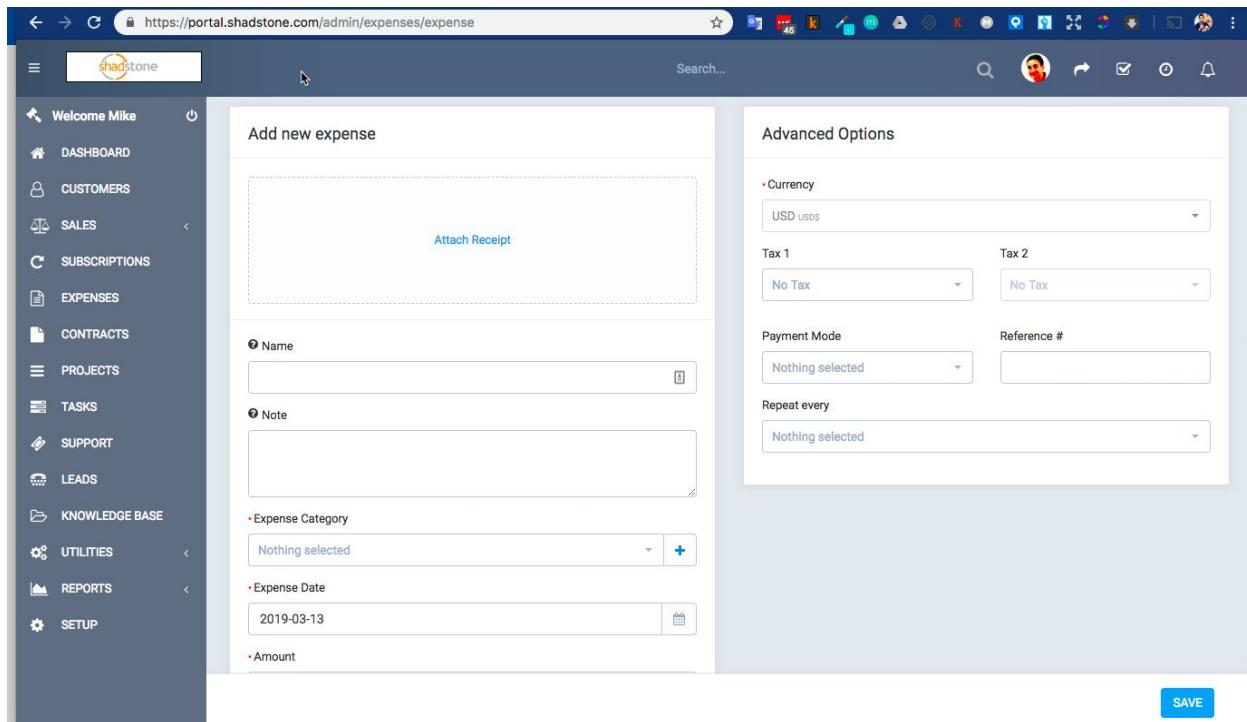
Total Customers	Active Customers	Inactive Customers	Active Contacts	Inactive Contacts	Contacts Logged In Today
9	9	0	4	0	0

Exclude Inactive Customers

Company	Primary Contact	Primary Email	Phone	Active	Date Created
2				<input checked="" type="checkbox"/>	2019-03-04 16:24:50
4				<input checked="" type="checkbox"/>	2019-03-07 09:14:56
9				<input checked="" type="checkbox"/>	2019-03-11 11:42:06
3				<input checked="" type="checkbox"/>	2019-03-07 08:52:50
7				<input checked="" type="checkbox"/>	2019-03-09 20:17:45
5	Para Living Inc			<input checked="" type="checkbox"/>	2019-03-07 09:15:09

## Expense Management

Staff can add expenses to be applied to customer accounts for certain projects and tasks.



Add new expense

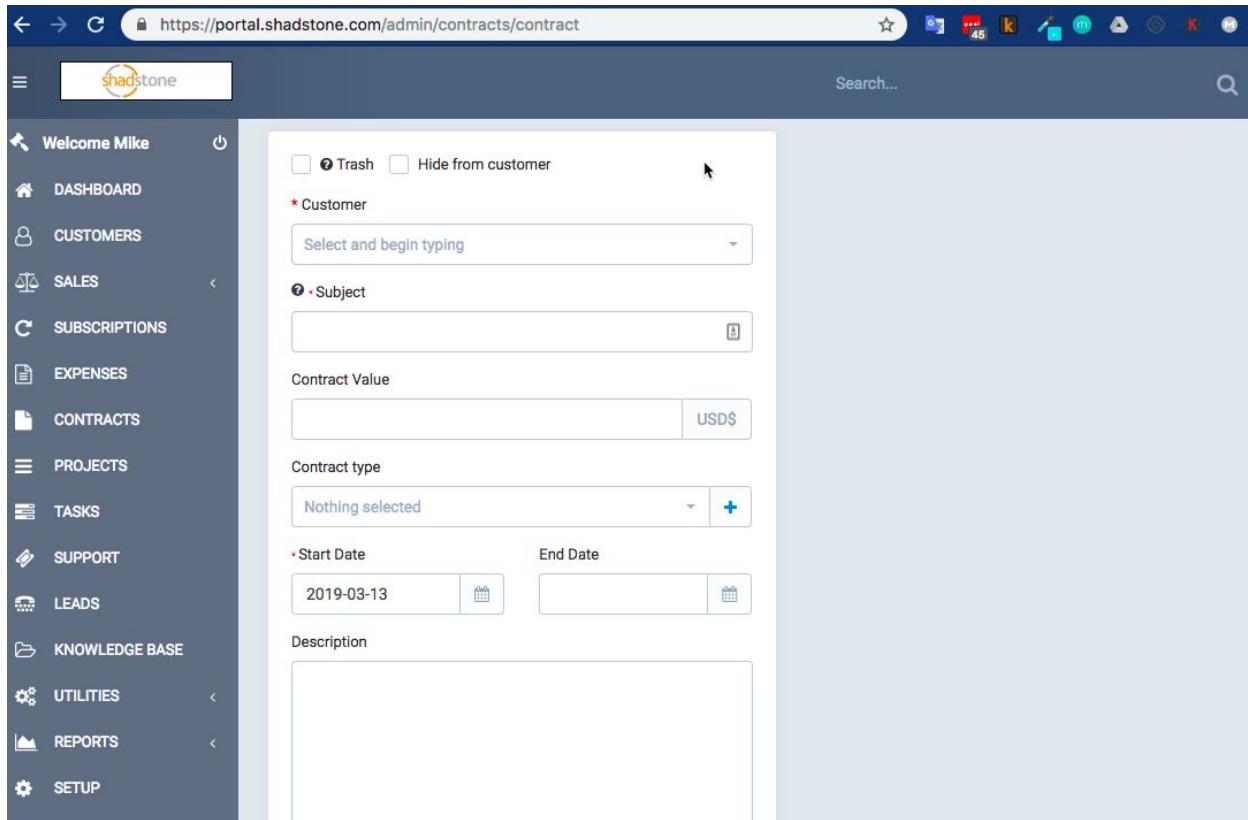
Advanced Options

Currency	
USD	USD \$
Tax 1	
No Tax	No Tax
Payment Mode	
Nothing selected	Reference #
Repeat every	
Nothing selected	

SAVE

# Create Customer/ Client Contracts

This can be client relationship / investor agreements, and the client can



https://portal.shadstone.com/admin/contracts/contract

Welcome Mike

DASHBOARD

CUSTOMERS

SALES

SUBSCRIPTIONS

EXPENSES

CONTRACTS

PROJECTS

TASKS

SUPPORT

LEADS

KNOWLEDGE BASE

UTILITIES

REPORTS

SETUP

Trash Hide from customer

\* Customer

Select and begin typing

\* Subject

Contract Value

USD\$

Contract type

Nothing selected

Start Date

2019-03-13

End Date

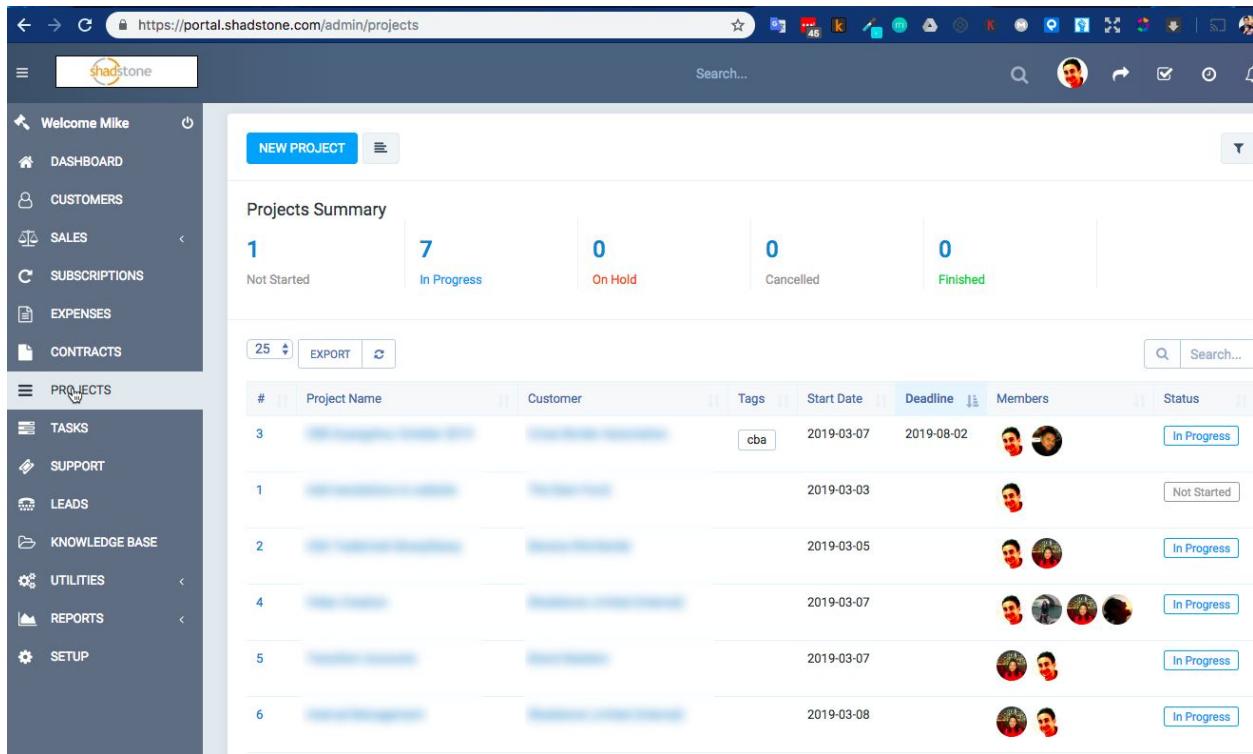
Description

Search...

# Project Status

All partners, staff, and clients (who have been granted access) access to view various projects, files, tasks, and more.

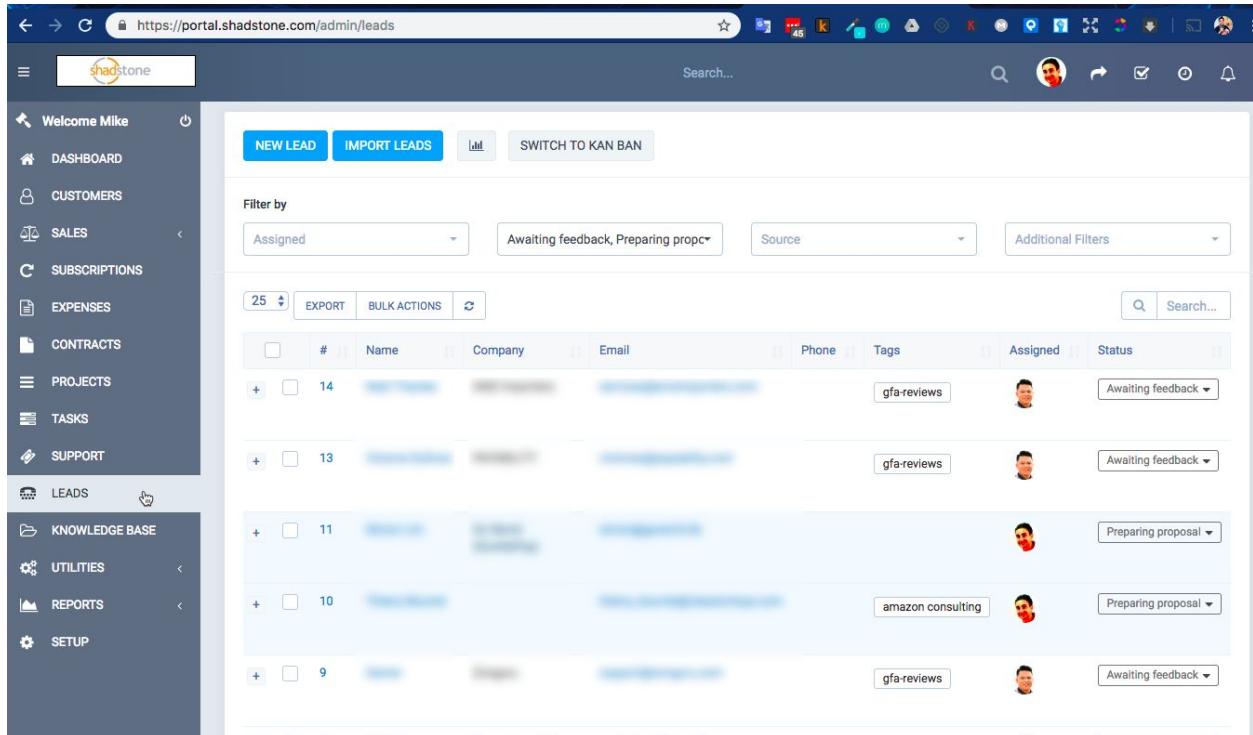
## CRM Demo Document



The screenshot shows the Shadstone CRM interface for Project Management. The left sidebar includes a 'Welcome Mike' message and a navigation menu with options like DASHBOARD, CUSTOMERS, SALES, SUBSCRIPTIONS, EXPENSES, CONTRACTS, and PROJECTS (which is currently selected). The main content area displays a 'Projects Summary' with counts for Not Started (1), In Progress (7), On Hold (0), Cancelled (0), and Finished (0). Below this is a table listing 6 projects, each with a project number, name, customer, tags, start date, deadline, members, and status. The projects are: 3 (cba, 2019-03-07, 2019-08-02, In Progress), 1 (Not Started), 2 (In Progress), 4 (In Progress), 5 (In Progress), and 6 (In Progress).

## Lead Management

Track potential investors, clients, even new staff recruits with lead management system



The screenshot shows the Shadstone CRM interface for Lead Management. The left sidebar includes a 'Welcome Mike' message and a navigation menu with options like DASHBOARD, CUSTOMERS, SALES, SUBSCRIPTIONS, EXPENSES, CONTRACTS, PROJECTS, TASKS, SUPPORT, LEADS (which is currently selected), KNOWLEDGE BASE, UTILITIES, REPORTS, and SETUP. The main content area displays a 'NEW LEAD' and 'IMPORT LEADS' button, a 'SWITCH TO KAN BAN' button, and a 'Filter by' section with dropdowns for Assigned, Status, and Source. Below this is a table listing 6 leads, each with a lead number, name, company, email, phone, tags, assigned to, and status. The leads are: 14 (gfa-reviews, Awaiting feedback), 13 (gfa-reviews, Awaiting feedback), 11 (Preparing proposal), 10 (amazon consulting, Preparing proposal), and 9 (Awaiting feedback).

## Powerful Reporting

Once this data is in the system, a wide range of management reports can be processed.

- Sales Report
- Expenses Report
- Expenses vs Income Report
- Leads Report
- Timesheets overview Report

## Even More Functionality Possible

CRMs can become massive systems. We believe starting small and getting the entire team to buy in and use it is most important, so simple is often better.