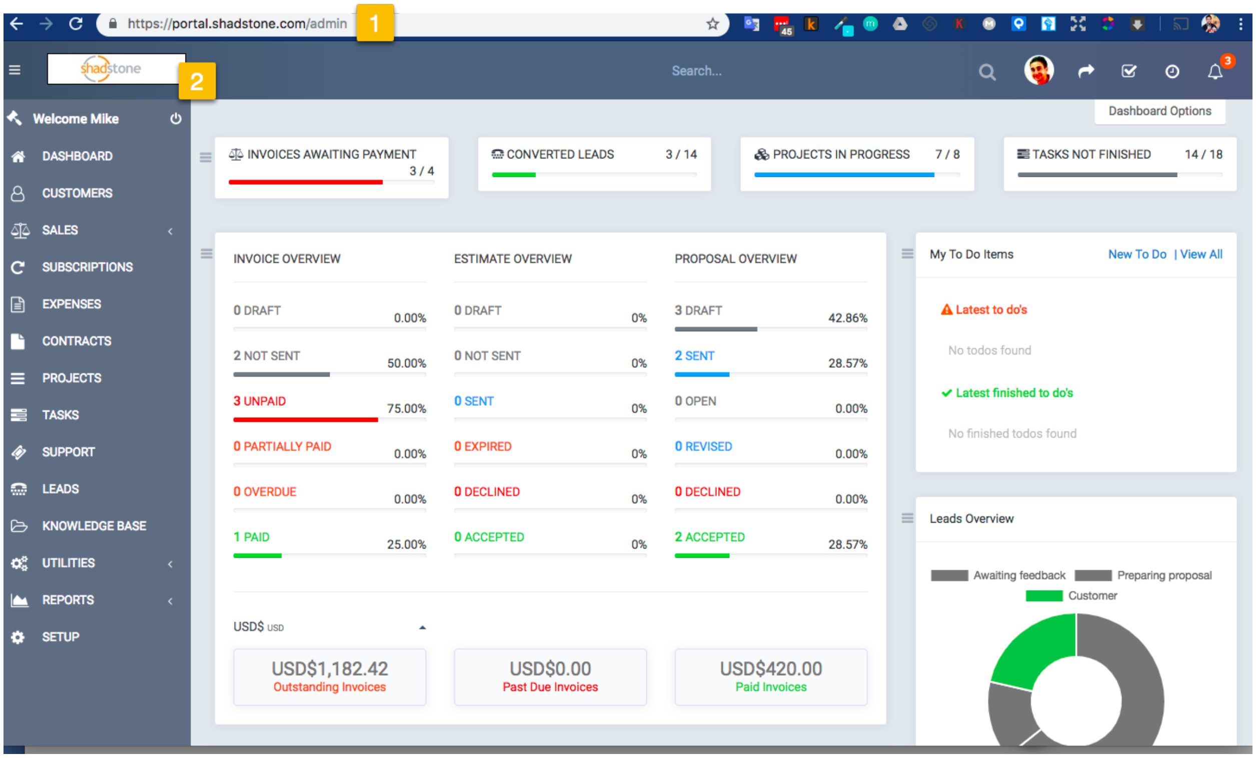
CRM Screenshots Demo - Shadstone Limited

Your Own Branding (Website + Logo)

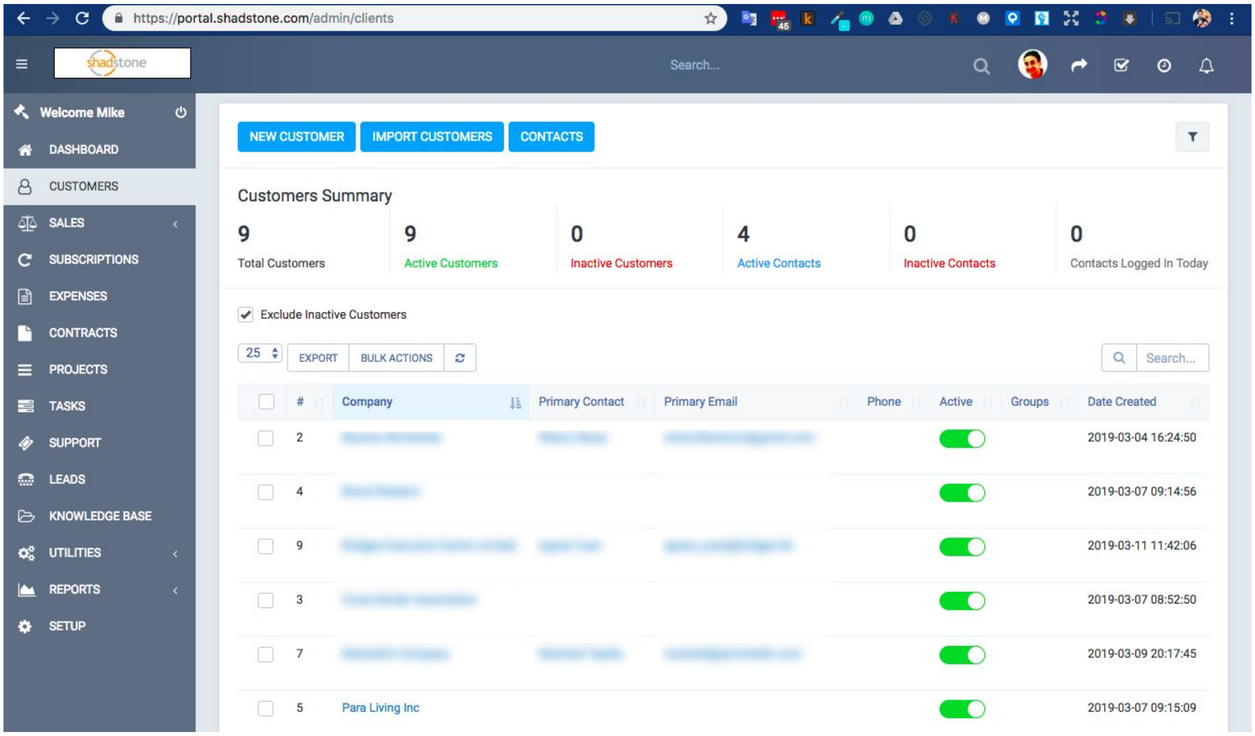
We feel it is important to have your own website URL for staff, partners, clients to see.

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.



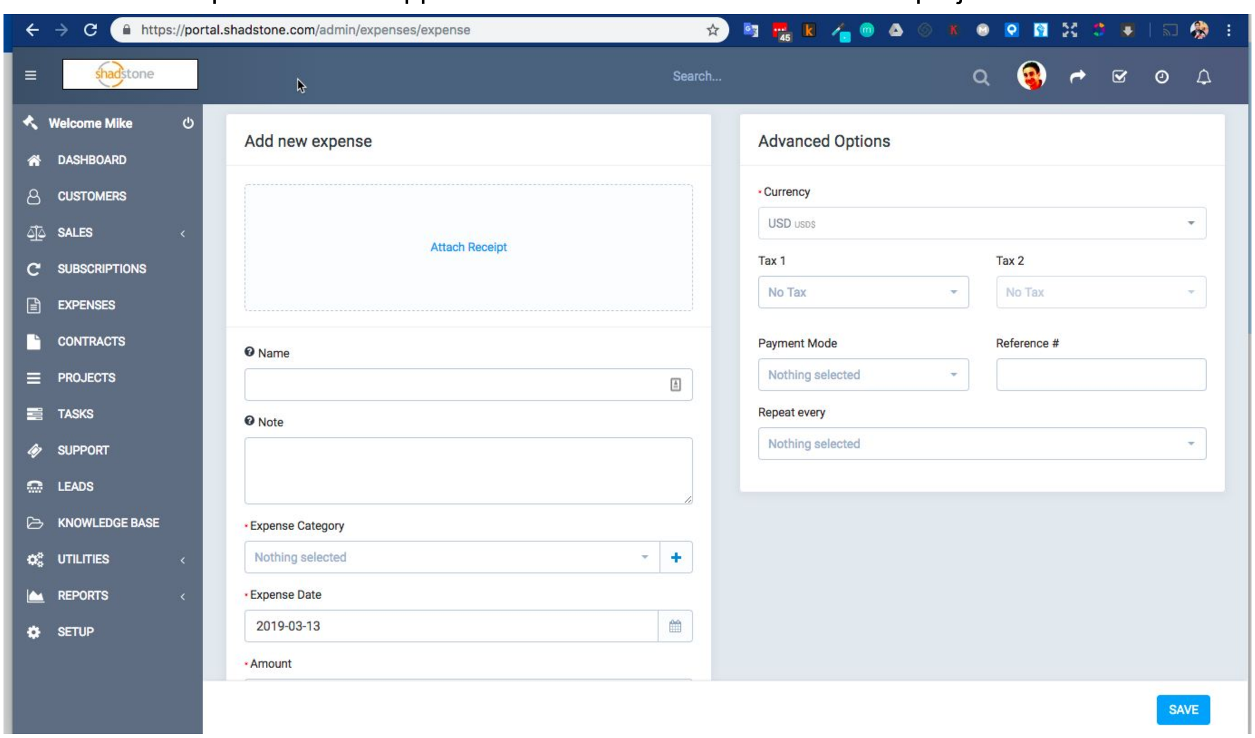
Customer (Client) Database & Logins

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.



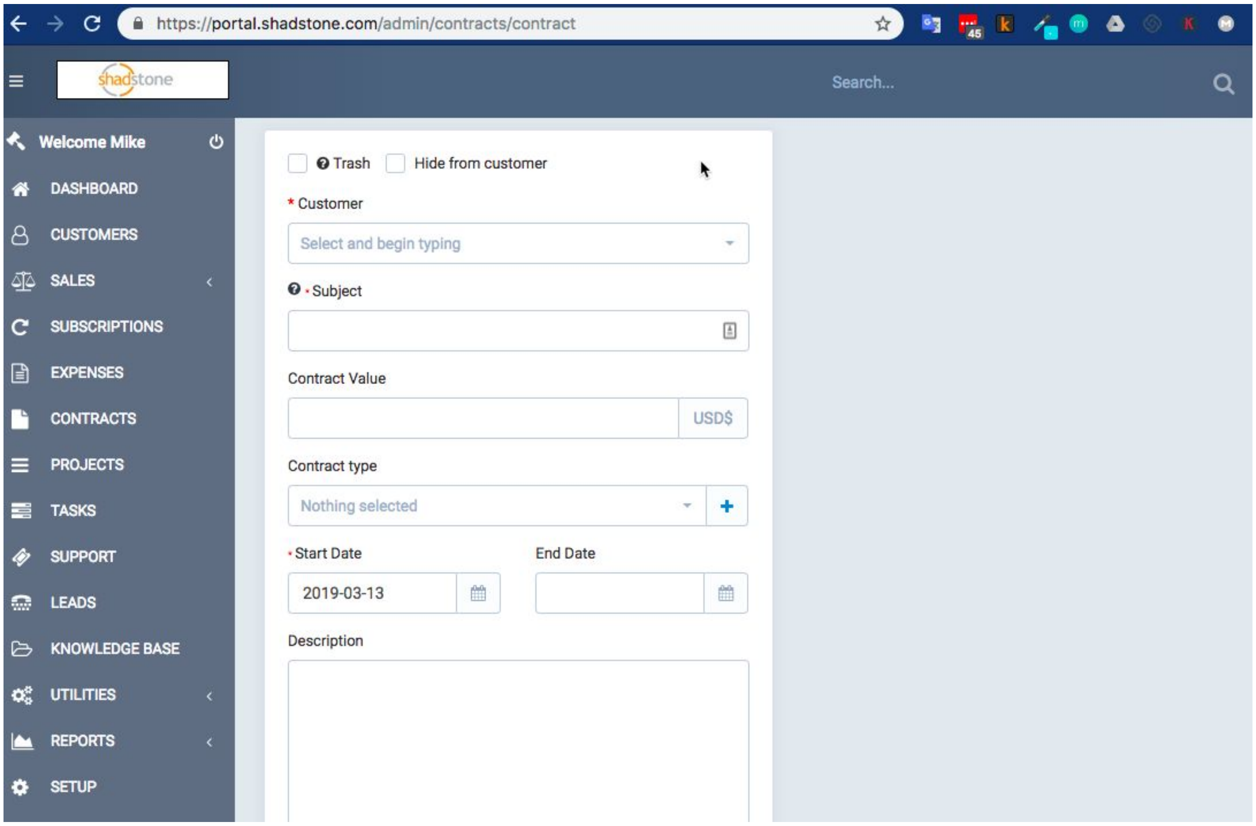
Expense Management

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



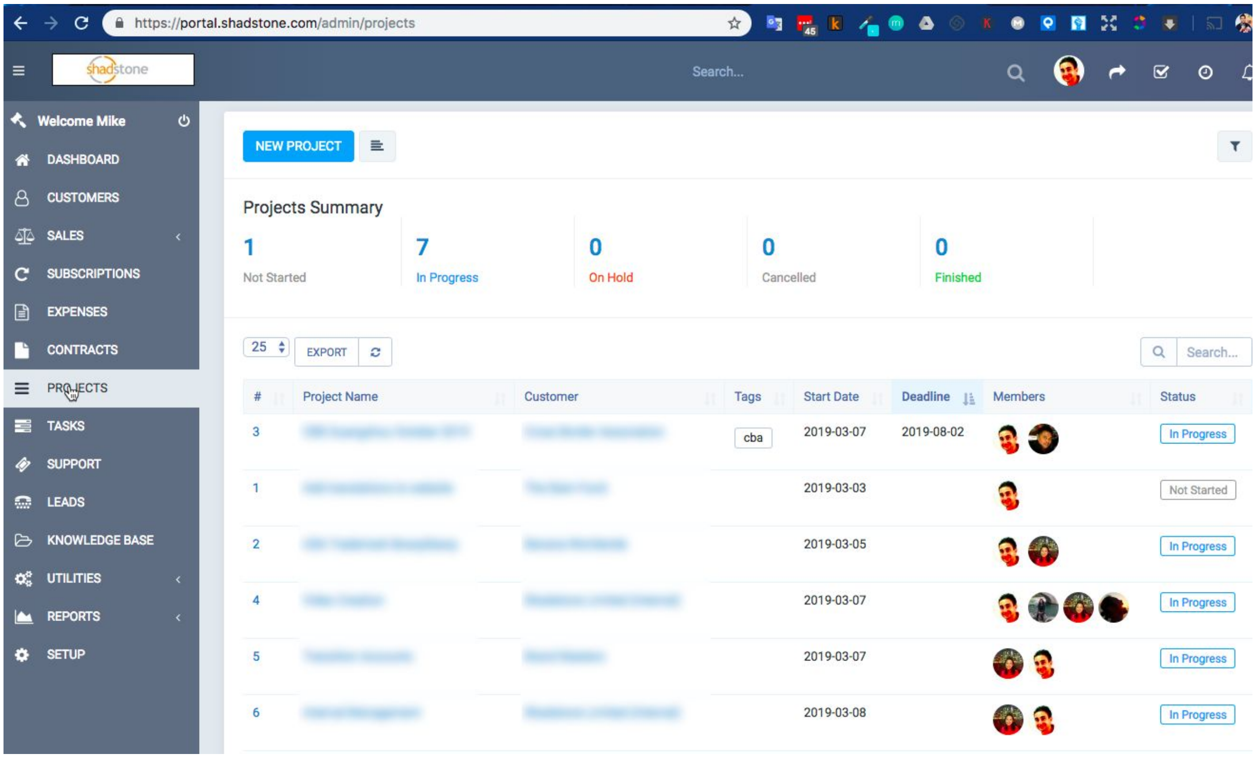
Create Customer/ Client Contracts

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



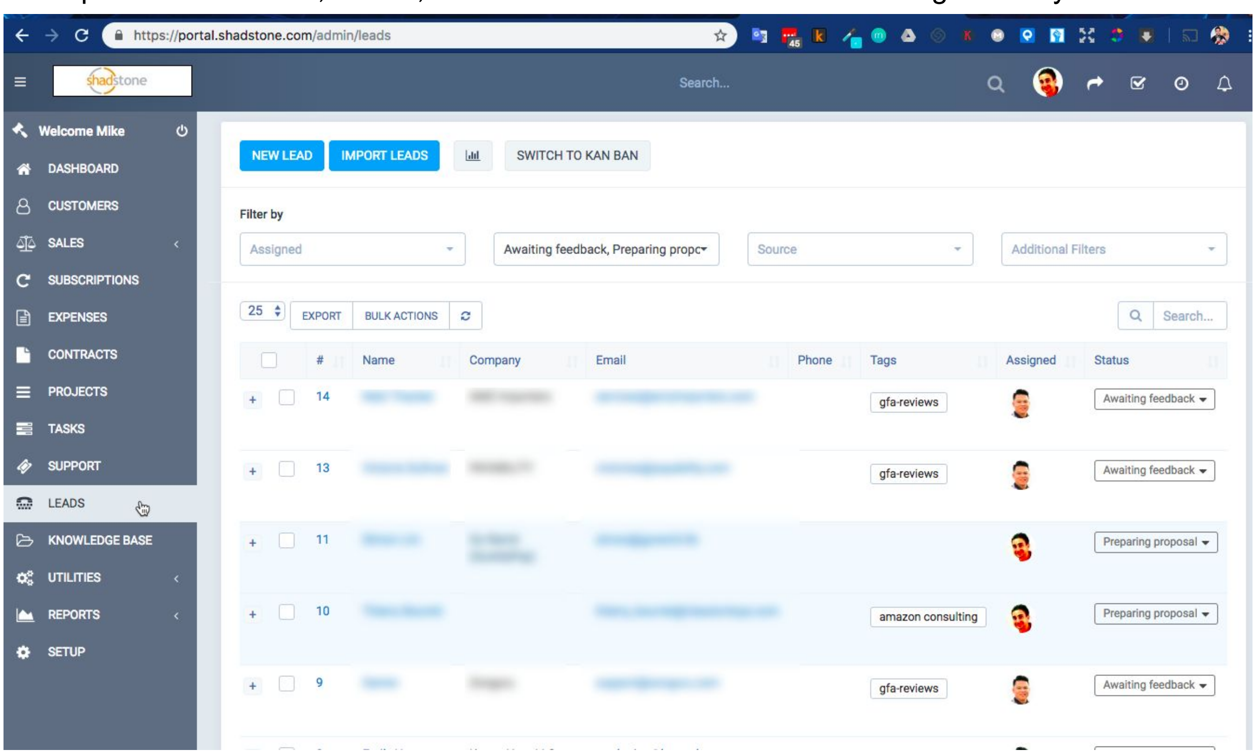
Project Status

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



Lead Management

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



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.