

CRM Demo Document

CRM Screenshots Demo - Shadstone Limited

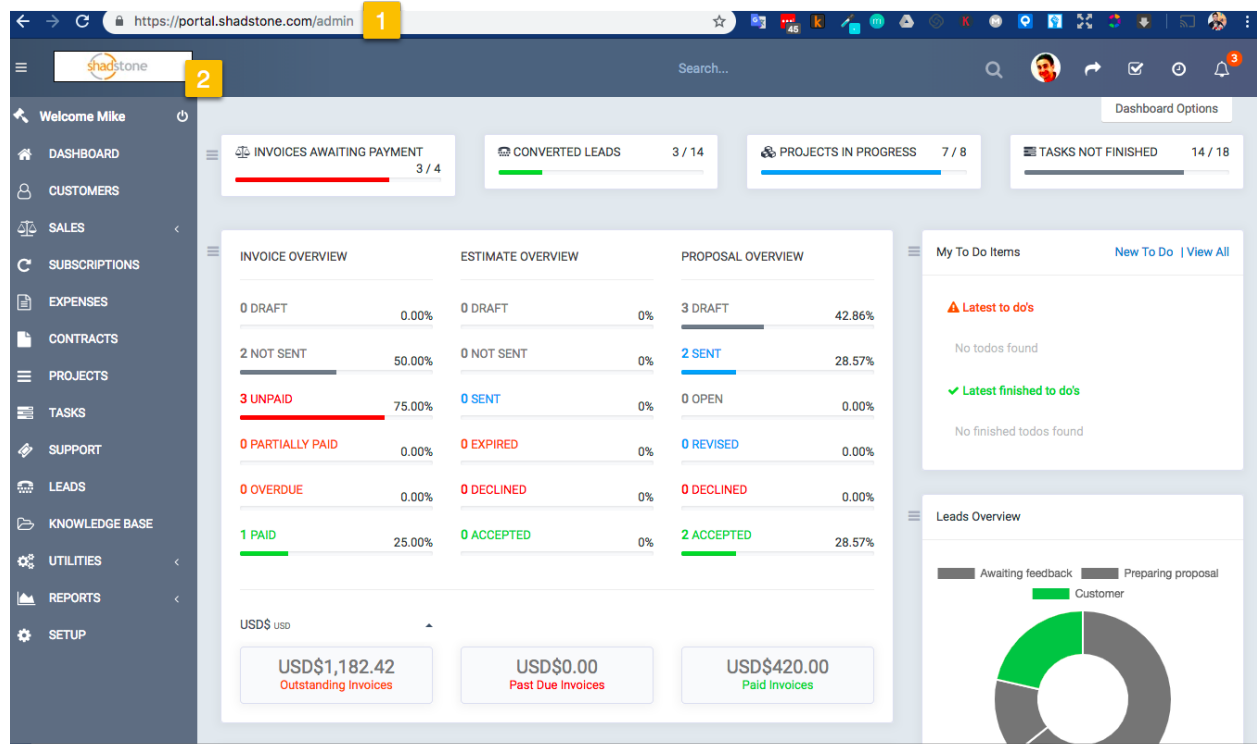
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Your Own Branding (Website + Logo)

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.

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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.

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The screenshot shows the CRM dashboard with the 'CUSTOMERS' section selected in the sidebar. The 'Customers Summary' section displays the following statistics:

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

Below the summary, there is a table of customers. The table has columns: #, Company, Primary Contact, Primary Email, Phone, Active, Groups, and Date Created. The 'Active' column contains toggle switches.

#	Company	Primary Contact	Primary Email	Phone	Active	Groups	Date Created
2	[Redacted]	[Redacted]	[Redacted]	[Redacted]	On		2019-03-04 16:24:50
4	[Redacted]	[Redacted]	[Redacted]	[Redacted]	On		2019-03-07 09:14:56
9	[Redacted]	[Redacted]	[Redacted]	[Redacted]	On		2019-03-11 11:42:06
3	[Redacted]	[Redacted]	[Redacted]	[Redacted]	On		2019-03-07 08:52:50
7	[Redacted]	[Redacted]	[Redacted]	[Redacted]	On		2019-03-09 20:17:45
5	Para Living Inc	[Redacted]	[Redacted]	[Redacted]	On		2019-03-07 09:15:09

Expense Management

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

The screenshot shows the 'Add new expense' form. The form includes the following fields:

- Attach Receipt:** A dashed box for uploading a receipt.
- Name:** A text input field.
- Note:** A text area for additional notes.
- Expense Category:** A dropdown menu with a plus icon to add new categories.
- Expense Date:** A date picker set to 2019-03-13.
- Amount:** A text input field for the expense amount.
- Advanced Options:**
 - Currency:** A dropdown menu set to USD USD.
 - Tax 1:** A dropdown menu set to No Tax.
 - Tax 2:** A dropdown menu set to No Tax.
 - Payment Mode:** A dropdown menu set to Nothing selected.
 - Reference #:** A text input field.
 - Repeat every:** A dropdown menu set to Nothing selected.

A 'SAVE' button is located at the bottom right of the form.

Create Customer/ Client Contracts

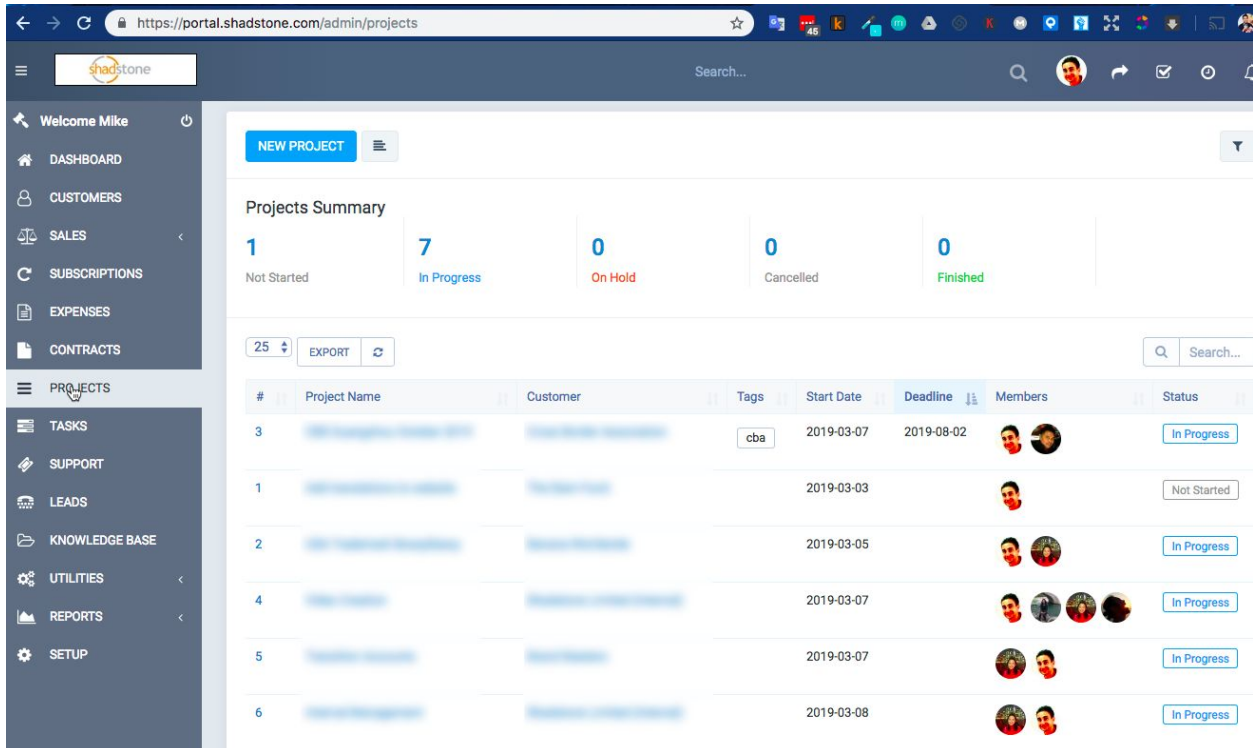
This can be client relationship / investor agreements, and the client can

The screenshot shows a web browser window with the URL <https://portal.shadstone.com/admin/contracts/contract>. The page features a dark blue sidebar on the left with a 'Welcome Mike' greeting and a list of navigation items: DASHBOARD, CUSTOMERS, SALES, SUBSCRIPTIONS, EXPENSES, CONTRACTS, PROJECTS, TASKS, SUPPORT, LEADS, KNOWLEDGE BASE, UTILITIES, REPORTS, and SETUP. The main content area is a light blue form titled 'Create Contract'. At the top of the form are two checkboxes: 'Trash' and 'Hide from customer'. Below these are two required fields: 'Customer' (a dropdown menu with the placeholder 'Select and begin typing') and 'Subject' (a text input field with a help icon). The 'Contract Value' field is a text input with a 'USD\$' currency selector. The 'Contract type' field is a dropdown menu showing 'Nothing selected' with a plus icon to add more options. There are two date pickers: 'Start Date' (set to 2019-03-13) and 'End Date'. At the bottom is a large 'Description' text area. The browser's address bar and various extension icons are visible at the top of the window.

Project Status

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

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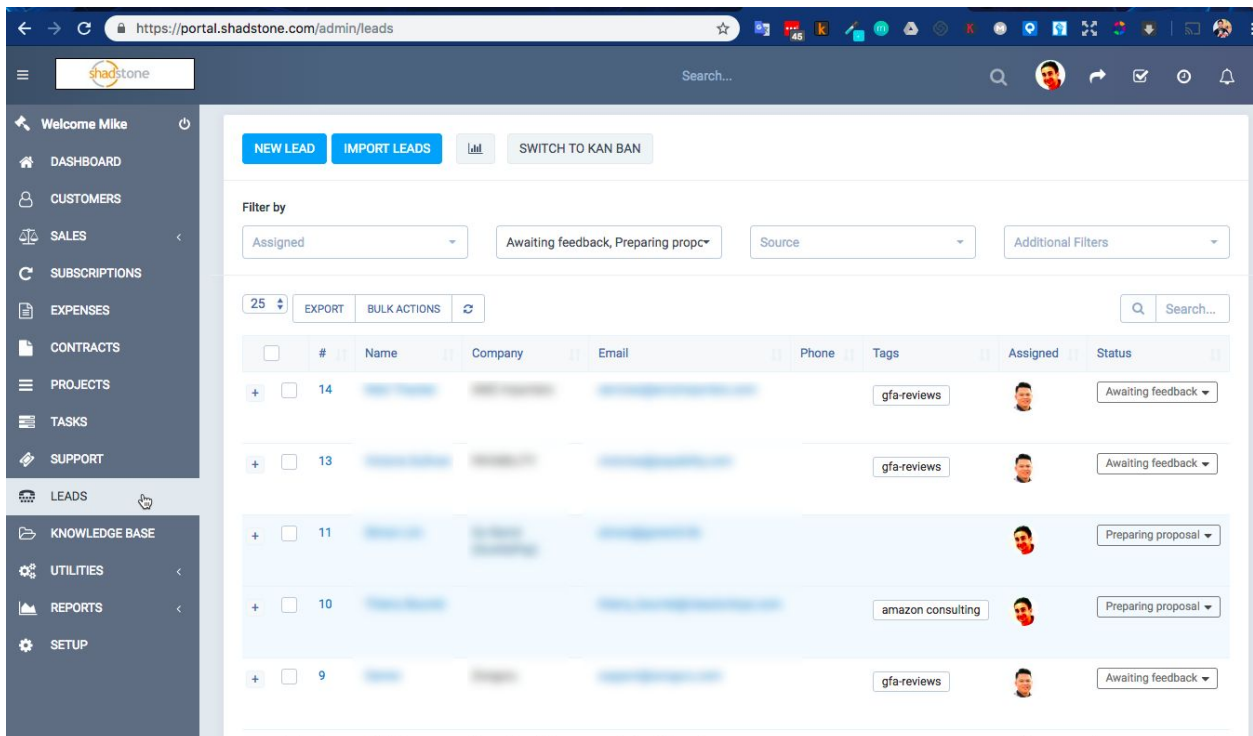


The screenshot shows the 'Projects' management interface in the Shadstone CRM. The left sidebar contains a navigation menu with options: Welcome Mike, DASHBOARD, CUSTOMERS, SALES, SUBSCRIPTIONS, EXPENSES, CONTRACTS, PROJECTS (highlighted), TASKS, SUPPORT, LEADS, KNOWLEDGE BASE, UTILITIES, REPORTS, and SETUP. The main content area features a 'NEW PROJECT' button and a 'Projects Summary' section with five cards: '1 Not Started', '7 In Progress', '0 On Hold', '0 Cancelled', and '0 Finished'. Below this is a table of projects with columns for #, Project Name, Customer, Tags, Start Date, Deadline, Members, and Status. The table lists six projects, with the first one in 'In Progress' status and the others in 'Not Started' or 'In Progress' status.

#	Project Name	Customer	Tags	Start Date	Deadline	Members	Status
3	[Blurred]	[Blurred]	cba	2019-03-07	2019-08-02	[2 Members]	In Progress
1	[Blurred]	[Blurred]		2019-03-03		[1 Member]	Not Started
2	[Blurred]	[Blurred]		2019-03-05		[2 Members]	In Progress
4	[Blurred]	[Blurred]		2019-03-07		[4 Members]	In Progress
5	[Blurred]	[Blurred]		2019-03-07		[2 Members]	In Progress
6	[Blurred]	[Blurred]		2019-03-08		[2 Members]	In Progress

Lead Management

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



The screenshot shows the 'Leads' management interface in the Shadstone CRM. The left sidebar is identical to the Projects page, with 'LEADS' highlighted. The main content area features a 'NEW LEAD' button, an 'IMPORT LEADS' button, and a 'SWITCH TO KAN BAN' button. Below these are filter options: 'Assigned' (dropdown), 'Awaiting feedback, Preparing propo' (dropdown), 'Source' (dropdown), and 'Additional Filters' (dropdown). A table of leads follows, with columns for #, Name, Company, Email, Phone, Tags, Assigned, and Status. The table lists five leads, with the first one in 'Awaiting feedback' status and the others in 'Preparing proposal' or 'Awaiting feedback' status.

#	Name	Company	Email	Phone	Tags	Assigned	Status
14	[Blurred]	[Blurred]	[Blurred]		gfa-reviews	[1 Member]	Awaiting feedback
13	[Blurred]	[Blurred]	[Blurred]		gfa-reviews	[1 Member]	Awaiting feedback
11	[Blurred]	[Blurred]	[Blurred]			[1 Member]	Preparing proposal
10	[Blurred]	[Blurred]	[Blurred]		amazon consulting	[1 Member]	Preparing proposal
9	[Blurred]	[Blurred]	[Blurred]		gfa-reviews	[1 Member]	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.