BOT Solutions

I'M
CONNECTING PEOPLE

CRM PROFILE

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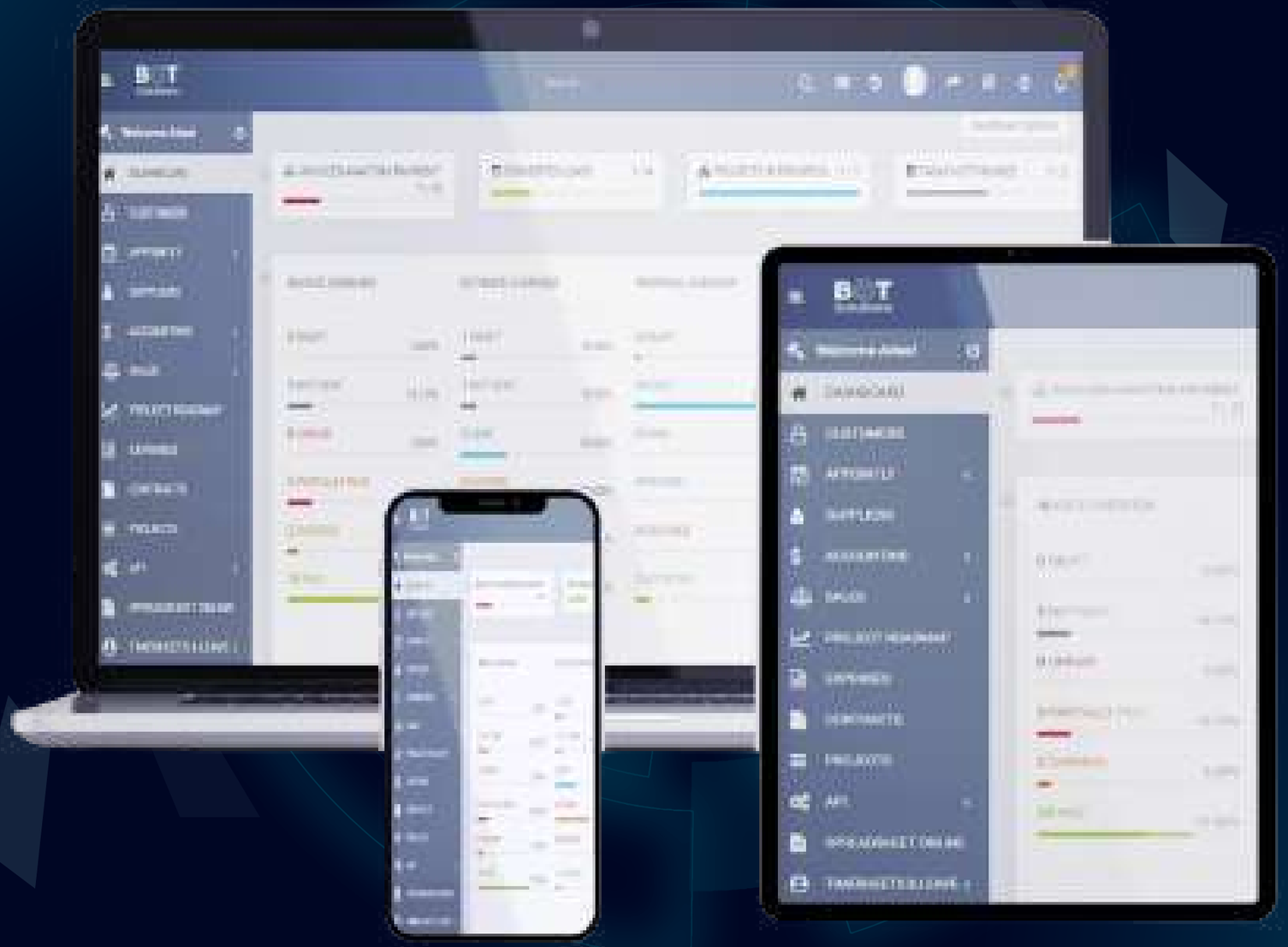
DASHBOARD



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DASHBOARD

- Invoices awaiting payments
- Converted Leads
- Projects & Tasks Status

To Do’s

- Payment Chart

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Contact Management

- one platform to stay in touch with your staff members, suppliers & customers

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Appointly

- Add & Delete appointment
- Create & set appointment
- View & make Callbacks

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Accounting

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PROPOSALS

CREDIT NOTES

ESTIMATES

PAYMENTS

INVOICES

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Tasks & Projects Management

- Add & delete tasks & projects
- Assign tasks & see tasks status
- Mark Finish & unfinished tasks

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Files & Folders Sharing

- Make online spreadsheets
- Add & Delete folders
- Share & download files

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Expense Management

- Create & Add expenses
- View stats & reports
- Daily, weekly, yearly & monthly

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HR Management

Employee

Notice Board

Department

Awards

Holidays

Attendance

work shift table

Payroll

Leave Applications

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Support System

- Feeback
- Q & A
- Complains
- Estimates
- Staff chats

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Product Manager

- Invoice products
- Subscription products
- Products categories
- Product groups
- Product orders

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Recruitments

- Add & Set campaigns
- Add & Delete candidate's profiles
- Set & view interviews

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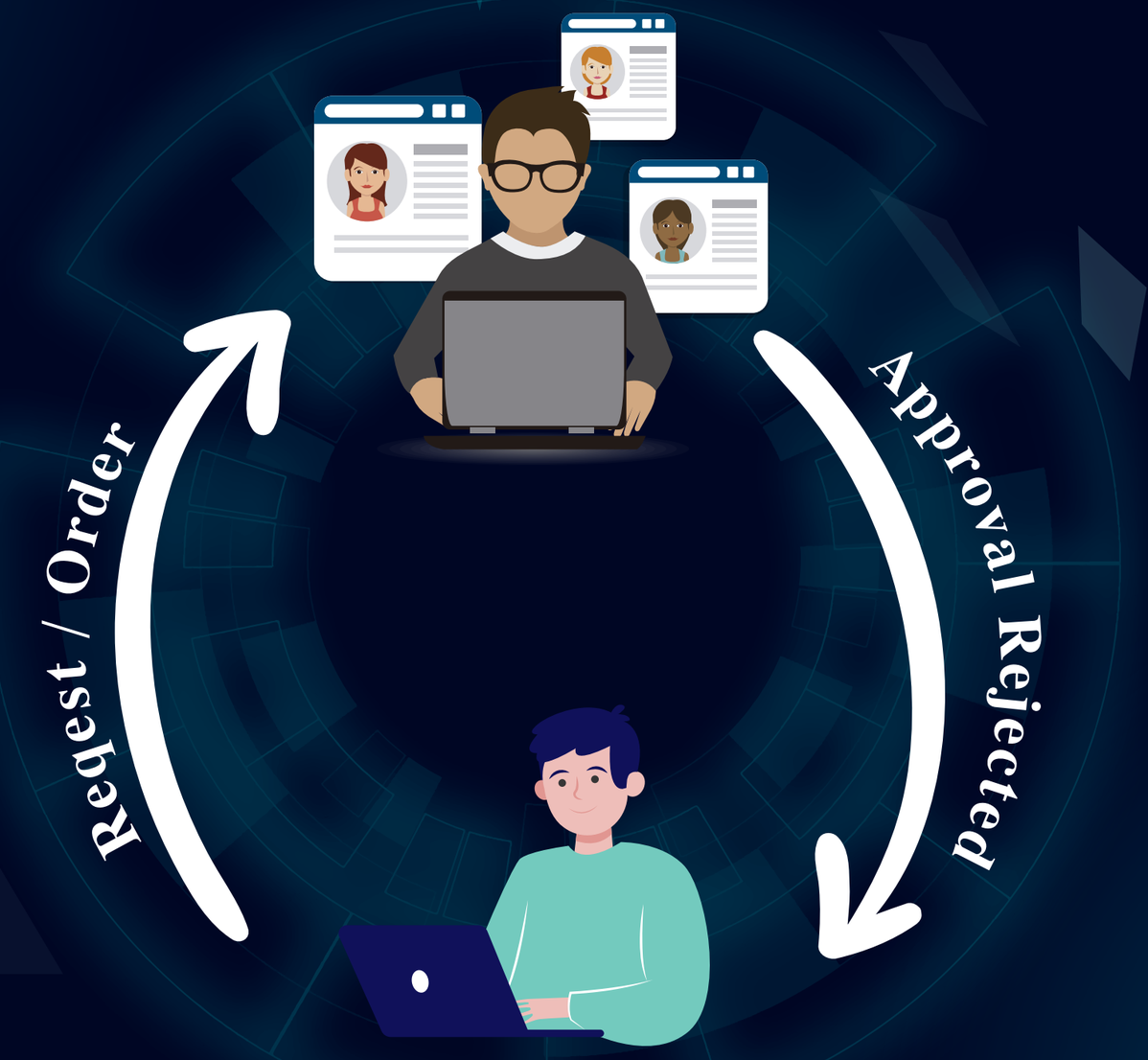
Approvals



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Reports

- Cash Flow
- Profit & Loss
- Purchase & Sale
- Expenses vs income
- lead reports

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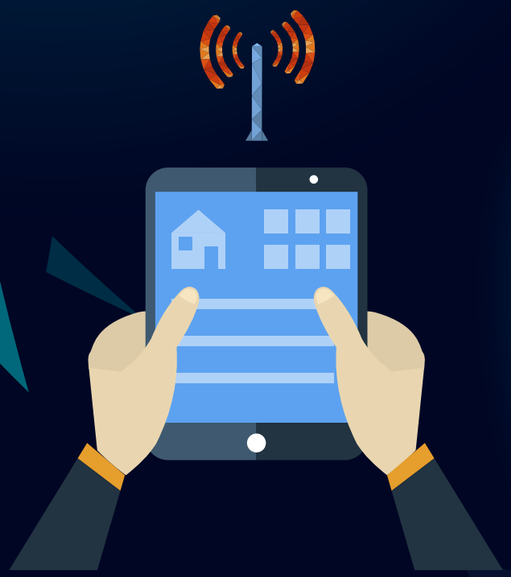
Utilities

Goals &
to do's

Custom
emails & sms

Activity log



Surveys

Notice board &
Announcements

BOT
Solutions

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