All the CRM features of Solastis CRM+

Ticketing System

An Advanced Case Management platform using which you can digitalize any business processes

Central Case Management

A central case management platform where all cases are registered and accessible. Instant clarity about all cases and work.

Multiple Case types

Create multiple case types to match to your business processes. Do the finer segregation of processes for reporting and authorization.

Sales, support and other processes

Digitalize any business process – sales, support or internal business processes.

Subcases

Break the large piece of work in smaller segments by creating subcases.

CRM Project Management

Create sequential steps in your case.This ensures that the Case is moving in an efficient and predefined order.

Task Template at Case Type Level

Create a task template and attach it to case type. Then every case created under that case type will follow the steps.

Review Tasks

Randomly pick up cases and flag it for review. When your employees know that the cases are randomly reviewed, they will be extra careful.

Questions at Task Completion

Specify questions to be answered on task completion. Capture information relevant for next steps.

Know the exact stage of each case

Easily understand at what stage each case is. If its moving well or stuck in some issues.

SLA Management

Activate SLA, and track the actual and planned time for each task. This way you can analyse the performance of CRM agents.

Email Notifications

System can be configured to send automatic notifications om happening specific events. This is useful to keep customers updated as case moves to next steps.

Assignment Rules

Automatically assign the tasks to CRM agents.

Automatically assign task to person

In configuration you can specify the assignment rules. When task is activated it derives the CRM agent to assign the task to.

Direct vs User group assignment

In assignment rules you can specify the direct CRM agent or do it via user group. The second option is better for assigning tasks for large teams.

Manage cross functional / Cross geography cases easily

Creating a task template and assigning tasks automatically makes it possible to execute complex multifunctional or multilocational cases easily.

CRM Analytics

For multidimensional analysis of cases and also for authorization control you can use these two objects and attach it to cases.

Multidimensional Case Analysis

You may want to take a case and group it with other cases or compare it with against. For this you need capture some characteristics of the cases like geography and business line.

Authorizations by multiple dimensions

Organizational unit, territory and case type are not only used in reports but are also available for defining authorization roles for cases.

Cross organization views

The three-dimensionalstructure we generate above is particularly useful in generating cross functional, cross geography views of cases. For example you may want to view the performance of cases across geographies or business lines.

CRM Agent Authorization

Solastis CRM provides a rich functionality to design authorization roles to suit your exact needs.

Authorization for Leads, Contacts, Cases

Authorization for leads contacts and Accounts is by the type action you may perform. For example you can specify authorization for create, change, delete, list and export.

Authorization at Case type level

Authorization for cases arebased on combination of Organizational unit, territory and case type. Whichever combination an agent is authorized, he can then do all the actions for cases belonging to that combination.

Authorization by roles

You create an authorisation role and then assign it to the user. One role can be granted to many users. So the authorization work need not be done again and again.

CRM Email

Emails is perhaps the most important aspect of a CRM system. Solastis CRM provides many options in this regards.

Email options

You can use your company domain email account or you can use the inbuilt email account in the CRM system for your account.

Full Email integration

Full fledged email client in the CRM system. Send and receive emails directly from the CRM system.

Email association to case

Emails received in the CRM system as well as emails send are automatically associated to the correct case.

Email to case

Specify to create a new case from incoming emails if the right case for association is not found. This is particularly helpful for emails where new enquiries keep on coming in.

CRM Dashboard

Data visualization at its best

Meaningful Dashboards

The dashboards we provide are shown as a collection of tiles, interconnected to each other to present one single dataset in meaningful manner. If you click on any data point the other tiles get adjusted automatically.

Bespoke Dashboards

Expecting that a single dashboard will suffice all businesses may be a oversimplification. For your specific business needs, we will design a dashboard only for you.

Enhanced Reports

Along with the dashboards, enhanced reports are also available. These reports give the data behind dashboards in a list format.

CRM Security

Solastis CRM takes security very seriously and we have many protective measures.

Recaptcha protection

Every login screen and signup screen has a recaptcha protection. The system will try to determine if a human being is logging in or is it some bot.

SSL Encryption

The system is securely encrypted using SSL encryption. This includes wildcard encryption for your specific domain.

Password policy

A proper password policy ensures that users don't use easily breakable passwords.

Google authenticator

Google authenticator gives a 2FA capabilities to our application. Once setup in your smartphone, every time you do a fresh login, system will ask Google authenticator randomly generated code.

IP Whitelisting

Here you can specify the list of ip addresses from which your staff can access the CRM system. If anybody tries to access the system from any other ip the system will not allow the login.

CRM Implementation Services

Implementation support is crucial for some organizations. While Solastis CRM is very

Simple configuration

Understanding and configuring Solastis CRM is very easy. There are only few concepts which once you understand you can start configuration.

Onboarding options

In our onboarding plan we offer from simple guidance to personalized configuration services for your organization.

Data migration

If you are already using any CRM and want to switch to Solastis CRM then migration of your leads, contacts, and accounts will be necessary. We provide a service to migrate this on your behalf.

Marketing plan option

Small businesses often lack the powerful marketing plan. Under our marketing support we will review your website, create a new landing page if required, prepare organic reach plan and setup a professionally designed google advertising campaign.