SWIVEL

CRM

Customer Retention Management

SWIVEL CRM is specifically design for logistics companies to help monitor their customer communications and activities within the sales pipeline.

Dashboard Window

- Sales Teams budgets and sales volume set up
- Daily communication log with customers
- Number of quote generation with quote reference #
- Campaign email blast
- Sales assessments and financial forecast
- Keep track of the number of customers and their progress

Sales Opportunites

- Mobile app available to work remotely
- Cloud CRM provides analytical reports
- Calendar planner integrated with the business calendar
- Keep track of sales quotes per customer inquiry

Sales Tools

- Generate sales quotes using CRM builtin tariff systems
- Search for tariff by POD and POL
- Copy an existing quote and generate a new quote
- Download sales activities to excel format
- Download carrier rates to excel

Sales Quotes Process

- Create a quote email directly to the customer for approval
- Once the quote is approved by the customer
- Create an booking in CRM and sync into ERP
- CRM keeps track of rejected quote in the system