

CRM

Manage every customer relationship from first contact to signed contract — in one platform.



Executive Summary

iVendNext CRM gives retail operators a complete sales management engine built directly into iVendNext Desk. From the moment a prospect enters the funnel as a lead to the day a contract is signed and the customer is won, every touchpoint is tracked, every follow-up is scheduled, and every campaign is measured. Sales teams manage leads, opportunities, appointments, and contracts in a single workspace. Marketing teams run email campaigns, newsletters, and multi-channel outreach — all linked back to leads and deals for measurable ROI. Managers see real-time pipeline analytics, sales funnel health, and response-time benchmarks without exporting a single spreadsheet. iVendNext CRM is designed for retail organisations that need the discipline of a full CRM without the complexity of a standalone system.

Sales Pipeline Management

Track every prospect from initial capture to closed deal — with full visibility at every stage.

Features	Description
Lead Capture	Automatically generate leads from emails, website forms, spreadsheet imports, or abandoned e-commerce carts, ensuring no sales prospect is ever missed.
Lead Status Tracking	Track leads through Open, Replied, Opportunity, Quoted, and Converted statuses — updated manually or automatically as actions are taken against the lead.
Opportunity Management	Convert qualified leads into opportunities with deal amount, probability, and currency fields to forecast revenue and prioritise the sales team's time.
Auto-Assign Opportunities	Define assignment rules to route incoming opportunities to the right sales executive automatically, ensuring balanced workloads and faster response times.
Auto-Close Opportunities	Set a configurable number of inactive days after which open opportunities close automatically, keeping the pipeline clean and reports accurate.
Appointment Scheduling	Schedule and manage customer appointments from inside iVendNext Desk, with auto-assignment to available agents based on workload and real-time availability.
Web Portal Booking	Customers self-book appointments via a public web page, confirm their email, and automatically receive an agent assignment and a new lead record in the system.
Contract Management	Create, sign, and track legally binding contracts against customers or transactions, with lifecycle status through Unsigned, Active, and Inactive stages.
Contract Templates	Define reusable contract templates using Jinja variables so field values like start dates and customer names populate automatically on every new contract.
Sales Stage Tracking	Define a custom list of sales stages and move opportunities through each one to maintain a live view of pipeline progression and individual deal health.
Opportunity Type Classification	Categorise every opportunity by type — Sales, Support, Maintenance, or custom — to route deals accurately and group pipeline reports by business function.
Lost Opportunity Analysis	Record loss reasons, competitor names, and detailed notes when a deal is lost, enabling long-term trend analysis and targeted process improvements over time.

Campaign & Communication

Reach the right prospect at the right time — with every message tracked back to a lead or deal.

Features	Description
Campaign Creation	Define structured marketing campaigns with names, goals, and descriptions, then attach email schedules to target leads and contacts with coordinated outreach.
Campaign Tagging	Tag campaigns against leads, opportunities, and quotations to trace which initiatives drive conversions and calculate the return on investment per campaign.
Email Campaigns	Send a coordinated series of scheduled emails to leads, contacts, or email groups, with each message timed automatically relative to the campaign start date.
Personalised Email Variables	Use lead or contact field values directly in email templates via doc. fieldname syntax so every recipient receives a message personalised to their own data.
Unsubscribe Management	Recipients opt out via an unsubscribe link in every email; the campaign document status updates automatically to Unsubscribed to prevent any further sends.
Newsletter Broadcasting	Compose and send informational newsletters to one or more subscriber groups with scheduled send support and an optional web view link for browser reading.
Email Group Management	Group subscriber addresses into named lists and import from leads or other transactions to keep mailing lists current without any manual data entry effort.
Lead Source Tracking	Record the channel — event, ad, web form, or referral — that generated each lead, then report on source effectiveness to guide marketing budget decisions.
Activity & Follow-up Reminders	Set a next-contact date on any lead or opportunity; a calendar event is created for the assigned executive and a notification fires on the scheduled day.
Communication History	All emails sent, replies received, comments added, and meetings logged are stored chronologically on the lead or opportunity record for full context visibility.
Campaign Efficiency Reports	Measure campaign ROI by analysing lead volume, conversion rates, and deal value generated per campaign across any selected date range and company filter.
Social Media Integration	Connect iVendNext to LinkedIn and Twitter via OAuth to share campaigns and product updates as social posts directly from within the CRM module interface.

Analytics & Automation

Turn pipeline data into decisions — with built-in reports, dashboards, and automated workflows.

Features	Description
Sales Funnel Report	Quantify prospects at each pipeline stage to identify conversion drop-offs and take corrective action before they impact quarterly revenue targets.
Sales Pipeline Chart	Compare total deal value across all sales stages in a visual chart, helping management prioritise high-value deals and allocate resources more effectively.
Opportunities by Lead Source	Visualise the business potential of open opportunities broken down by lead origin channel so marketing spend can be directed to the most productive sources.
Lead Details Report	Access a consolidated overview of every lead with status, source, conversion outcome, and key metrics in one filterable report for performance reviews.
Prospects Not Converted	Identify leads and opportunities that were engaged but never converted, revealing follow-up gaps and process improvements needed to raise the overall win rate.
Minutes to First Response	Measure how quickly sales executives first reply to new opportunities, providing a quantifiable service benchmark to drive response-time improvements.
Inactive Customer Report	List all customers who have not placed an order within a defined number of days, giving the sales team a targeted re-engagement list with zero manual effort.
Lost Opportunity Report	Review all lost deals by territory, competitor, sales stage, and stated reason in one report to identify patterns and strengthen the sales strategy over time.
CRM Settings & Automation	Configure lead deduplication, automatic contact creation on lead save, quotation validity periods, and communication forwarding from one central settings page.
Campaign Naming Rules	Enforce consistent naming conventions across all campaigns by defining an automated naming series, eliminating inconsistent labels and improving report filters.
Territory Management	Define geographic sales territories and assign them to leads and opportunities so that regional performance can be tracked and field team coverage optimised.

Global Footprint

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