cdg MBS Modularity Billing System

Modularity Billing System (MBS): CRM / Prospects

CDG's CRM / Prospects module helps manage and track your business's prospective enterprise, business, and individual clients from first contact to installation.

OVERVIEW

The CRM / Prospects module provides a central location to record your business's prospects and manage relevant data associated with them, including contact information, prospect stage, conversion probability, projected revenue and cost, proposed products and services, contract and proposal documents, and company-specific information. You can also assign sales agents; view, assign, and complete tasks that have been associated with your prospects and sales process; get in-person or email e-signatures; and schedule prospect visits through the MBS Field Tech app.

CRM / PROSPECTS FEATURES

- Store and track information for enterprise, business, and individual subscriber prospects.
- Manage prospect information, including organization, status, estimates, and contact details.
- Assign sales agents to prospects.
- Create and assign tasks associated with prospects and sales process.
- Attach files, generate proposals and other documents, and get in-person or email e-signatures.
- Manage prospect visits and other tasks through your personal calendar in MBS Field Tech app.
- Begin installations for converted prospects directly from the CRM / Prospects module.

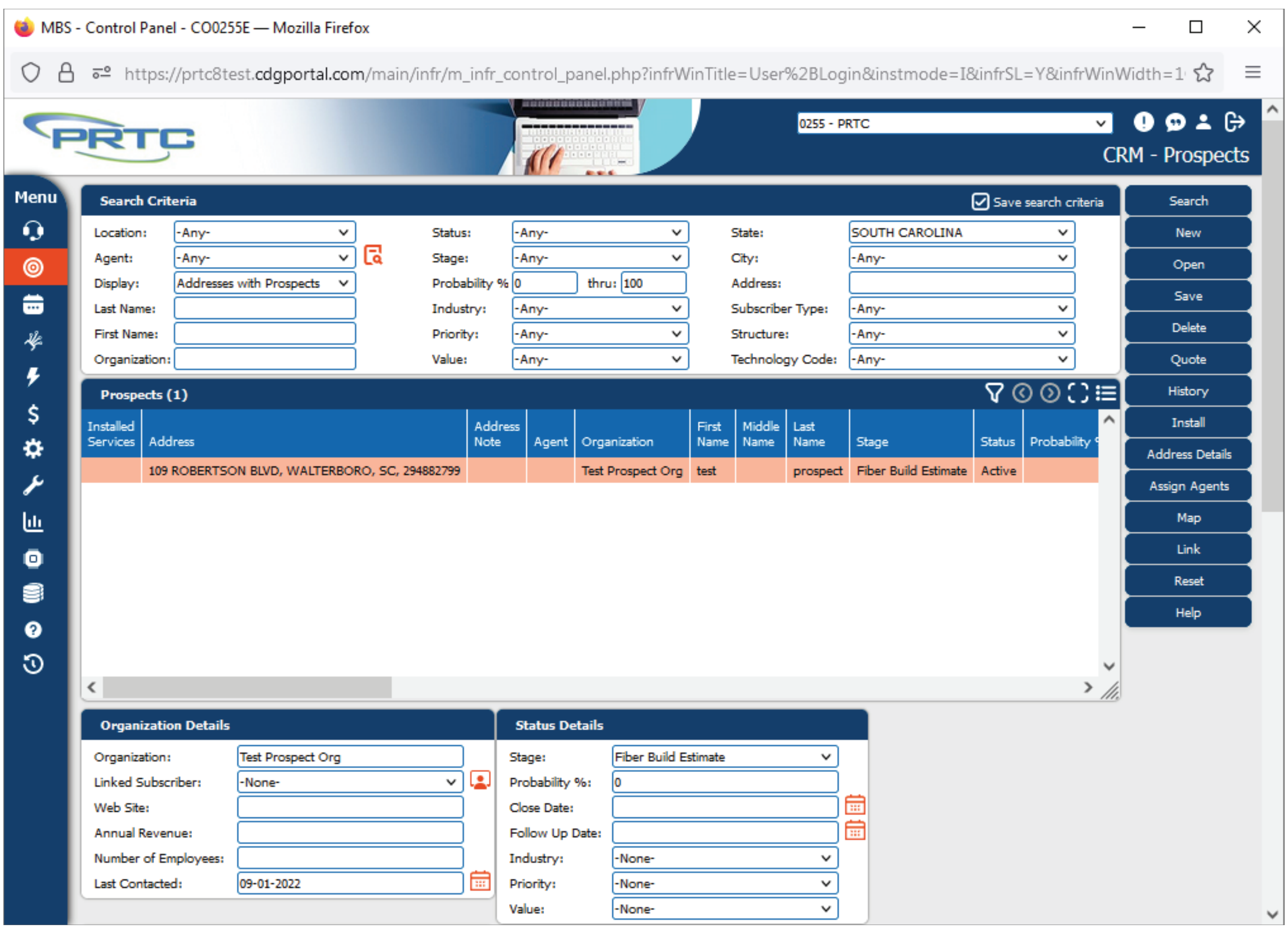

Fig. 1 CRM / Prospects Module

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