

 DISCOVERCRM

XAPSYS CRM EXTENDED PROFILE

 Xapsys™

OVERVIEW

Empower your sales teams with an intuitive and easy to use CRM that seamlessly integrates with Sage 50 and Sage 200.

- All customers, suppliers and contacts directly imported from and sync back to Sage.
- Create and track opportunities.
- Customize sales pipeline to reflect your sales process.
- Raise quotes with Sage products, prices, and price bands directly in CRM.
- One click convert quotes to sales orders or proforma invoices, instantly synchronized into Sage, without leaving CRM.
- Track emails, tasks and appointments from MS Office 365 into CRM
- Improve after sales and customer satisfaction with case management

Xapsys CRM is the only free CRM that integrates with Sage - Free forever for as much as 5 users. Implemented under 1 hour at no cost.



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Xapsys CRM
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✗
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✓
SALES GAMIFICATION	✓
QUOTATION HANDLING	✓
TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✗
SUPPLEMENTARY FEATURES	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✓

SOCIAL RELATIONSHIP MANAGEMENT	✗
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✗
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✓
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✗
ANDROID APP	✗
NATIVE WEB APP	✓
HOSTING METHOD	
CLOUD	✓
ON-PREMISE	✗
FURTHER INFORMATION	
PRICING	From free*

SOFTWARE SCREENSHOTS

X

[Create New](#)

hugo@xapsys.co.uk [Log off](#)

Xapsys CRM

Opportunities Status

Orders Today
£0.00

Target: £300.00 Variance: £300.00

Orders WTD
£0.00

Target: £600.00 Variance: £600.00

Orders MTD
£273.34

Target: £2,100.00 Variance: £1,826.66

Orders YTD
£273.34

Target: £74,100.00 Variance: £72,826.66

My Activities

Recent Opportunities

Opened	Description	Forecast	Certainty %	Updated	Status
04/03/2020	test xapsys	12000.00	50	04/03/2020	➔

My Quotes

Date	Order No	Total Net	Requested
01/01/0001		0.00	01/01/0001

hugo@xapsys.co.uk Log off

Xapsys

Company Details

Name Xapsys	Email Phil@xapsys.co.uk	Account Number XAPSY01	Address Xapsys 17 Boston road Leicester LE4 2WV United Kingdom
Type Customer	Phone +44 116 232 3150	Currency GBP	
Account Manager hugo@xapsys.co.uk	Website http://www.xapsys.co.uk	Credit Limit 0.00	
Primary Contact Unassigned		Payment Terms 0	
		Price Band Unassigned	

Recent Opportunities

Owner	Opened	Description	Forecast	Certainty %	Updated	Status
hugo@xapsys.co.uk	09/03/2020	Bespoke manufacturing solution	30000.00	75	10/03/2020	🔄
hugo@xapsys.co.uk	09/03/2020	Woo commerce sync	2000.00	50	10/03/2020	🔄

People

Phil Cox [New Person](#)

Notes

[New Note](#)

Activity

March 12th 2020

Delivery

Discussed due by date

[Edit](#) [Delete](#)

Quotes

[New Quote](#)

March 11th 2020

quote accepted

client agrees

[Edit](#) [Delete](#)

Notes

Hugo has proposal from Draycir 2 minutes ago

[New Note](#)

Files

Drop files here to upload

[xapsys ctm new company.png](#) 4 kb

hugo@xapsys.co.uk Log off

Opportunities

New Opportunity

Show 10 opportunities Search: xaps

Status	Opened	Description	Company	Person	Updated Date	Certainty	Forecast	Owner
🔴	27/02/2020	Shop Floor data collection system	Xapsys	Jack	10/03/2020	50	15,000.00	hugo@xapsys.co.uk
🟢	27/02/2020	Custom KPI dashboards for school governors	Xapsys	PHIL	10/03/2020	100	10,000.00	hugo@xapsys.co.uk
🟡	04/03/2020	Customer portal design	Xapsys	PHIL	10/03/2020	50	12,000.00	hugo@xapsys.co.uk
🟡	09/03/2020	Woo commerce sync plugin	Xapsys	PHIL	10/03/2020	50	2,000.00	hugo@xapsys.co.uk
🟡	09/03/2020	Bespoke manufacturing solution	Xapsys	PHIL	10/03/2020	75	30,000.00	hugo@xapsys.co.uk
🟢	30/08/2018	WORKTOP 3 X 3M LENGTH	Xapsys	Phil	07/01/2019	100	750.00	info@trifibre.co.uk
🟢	11/12/2018	Dell XPS	Xapsys	Phil	11/12/2018	100	729.50	chris@trifibre.co.uk

Showing 1 to 7 of 7 opportunities

[Previous](#) [Next](#)