



Try  
Now  
for free



**PIPAL**  
**CRM**

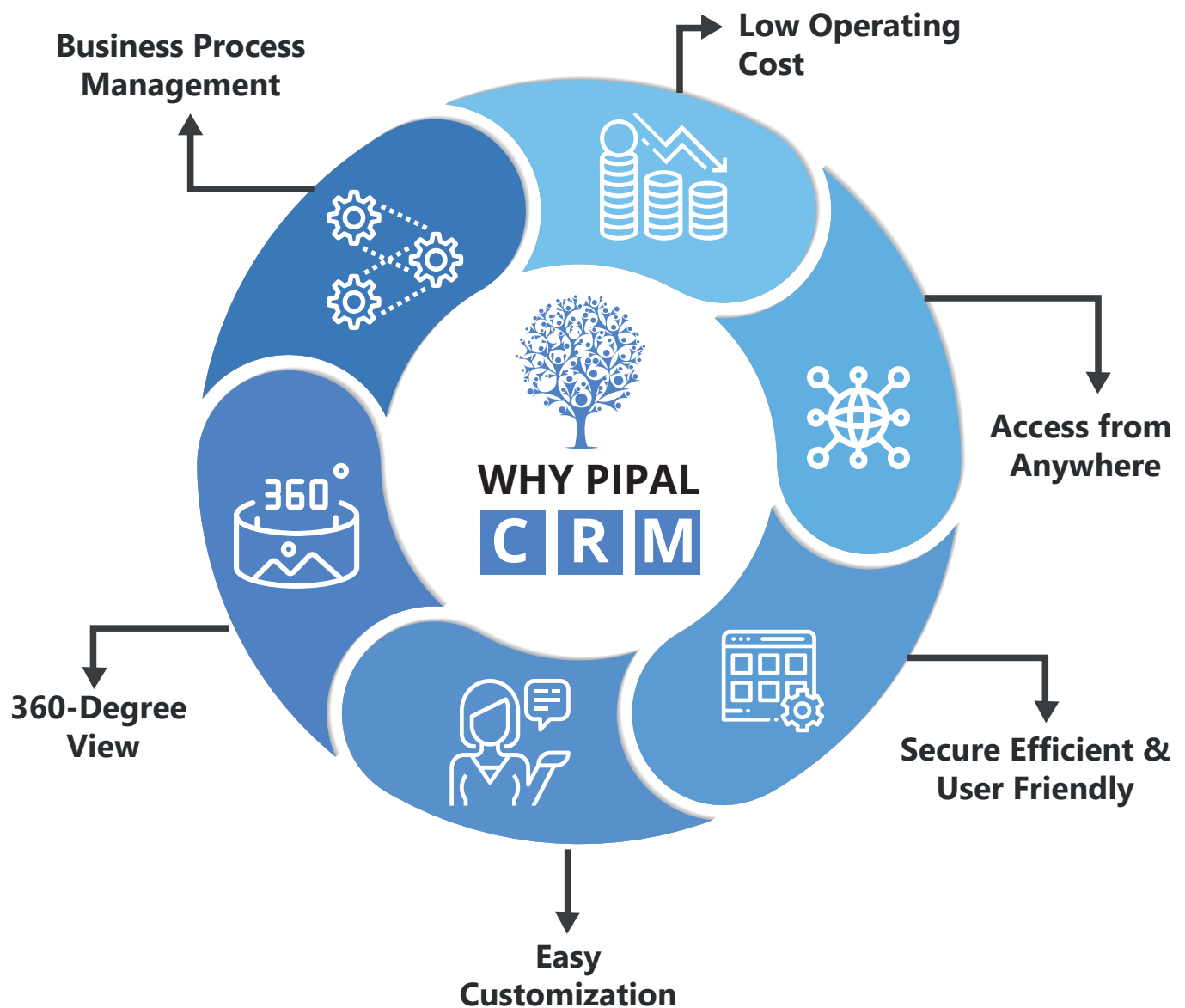
Enhanced Productivity Simplified

# Manage Your Sales **Efficiently**

Designed For Your Growing Business

# Engage, strengthen, and amplify your revenue and relationships with Pipal CRM

Pipal CRM boosts your organization's productivity by providing rich, user-friendly features that allow you to effortlessly manage your sales, marketing, and customer support functions.






# CONVERT LEADS INTO LOYAL CUSTOMERS WITH PIPAL CRM

## Sales Automation

Pipal CRM enables sales professionals to dedicate more time to their customers, resulting in more closed deals and a stronger customer base. Enhance your sales pipeline management and accelerate lead conversion with Pipal CRM.

- Lead management
- 360-degree view
- Leads to opportunity management
- Lead scoring and prioritization
- Across/multi-location organization
- Onboarding
- Forecasting and analysis convert leads into customers faster with pipal crm.


**PIPAL CRM**

Name  
Drip email campaign

Target Entity Type  
Lead

Description  
This show how it's possible to run drip campaigns with BPM.

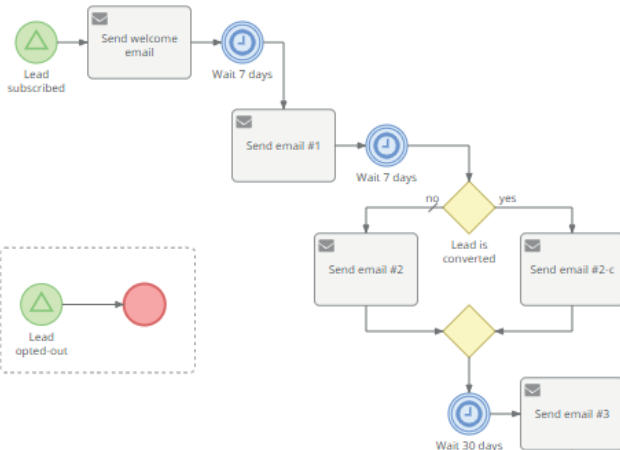
Is Active ☐

Assigned User  
None

Teams  
None

Created  
28 Aug, 2020 20:22 » Admin

Modified  
28 Jan, 2022 04:31 » Admin



```

graph LR
    Start([Lead subscribed]) --> SendWelcome[Send welcome email]
    SendWelcome --> Wait7_1((Wait 7 days))
    Wait7_1 --> SendEmail1[Send email #1]
    SendEmail1 --> Wait7_2((Wait 7 days))
    Wait7_2 --> Decision1{Lead is converted}
    Decision1 -- no --> SendEmail2[Send email #2]
    Decision1 -- yes --> SendEmail2c[Send email #2-c]
    SendEmail2 --> Decision2{ }
    SendEmail2c --> Decision2
    Decision2 --> Wait30((Wait 30 days))
    Wait30 --> SendEmail3[Send email #3]
  
```

Lead opted-out


**PIPAL CRM**



50.94

Lead-to-Opportunity Ratio (%)

Liza Bee  
Sales Manager 1

21.43 %  
Won Contribution

Sagar Savedkar  
Sales Manager 2

21.43 %  
Won Contribution


**PIPAL CRM**

Leads > Create

Save Cancel

Overview

Name \*

First Name Last Name

Account Name

Email

Phone

# SUPERCARGE YOUR MARKETING EFFORTS WITH OUR CUTTING-EDGE PIPAL CRM

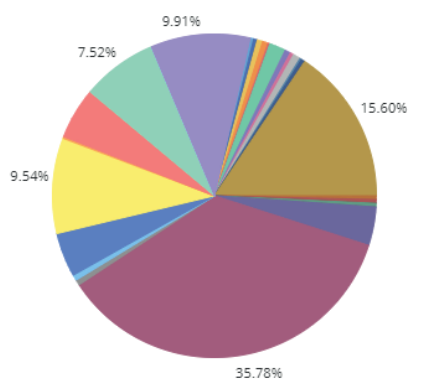
## Marketing Automation

Effortlessly manage leads, customize campaigns, and monitor ROI with our user-friendly platform. Boost engagement, enhance conversions, and grow your business using data-driven marketing strategies—all within one powerful tool. Equip your sales team to generate more leads and eliminate missed opportunities.

- Campaign management
- Auto lead generation
- Lead qualification
- Mass emailing
- Lead capture from different sources
- Customizable reports for managing marketing techniques classification and tagging for handling contacts and customers.



Count



- Bounce Chec
- Healthcare campaign
- Mobile Application
- New Cash Back Offer
- New Mobile Application
- New Product
- New Seasonal Offer
- Product Offers
- Product Saver Plan 2022
- Test 3
- Test Campaigning
- Test review
- Welcomoffer
- Bounce Check 1
- iOS Campaign
- New Campa
- New Cash Offer
- New Offer Campaign
- New Product information
- Offer
- Product Plan Vouchers
- Test
- Test Campaign for Tracking
- Test Campaigns
- Test\_123



### Mass Emails > Test Campaigning 2023-07-01

Edit ...

Name	Status
Test Campaigning 2023-07-01	Complete
Campaign	Date Start
Test Campaigning	01 Jul 01:30
Target Lists ⓘ	Excluding Target Lists ⓘ
2023 campaign	None



Accounts Contacts Le

### Campaigns > Test Campaigning

Edit ...

Name  
Test Campaigning

Type  
Email

Budget  
\$100,000.00

Target Lists ⓘ  
2023 campaign

Description  
None

### Create Mass Email

Save Full Form Cancel

Name \*  
Test Campaigning 2023-09-28

Status  
Pending

Date Start \*  
[Calendar Icon] [Clock Icon]

Target Lists \* ⓘ  
2023 campaign

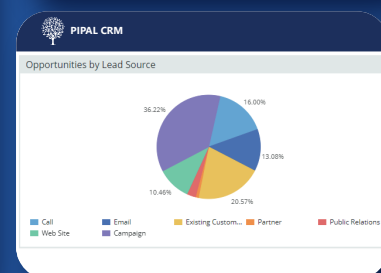
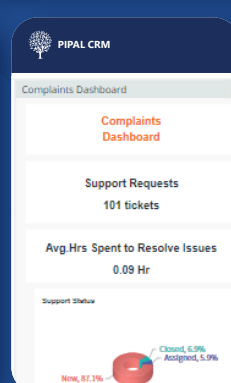
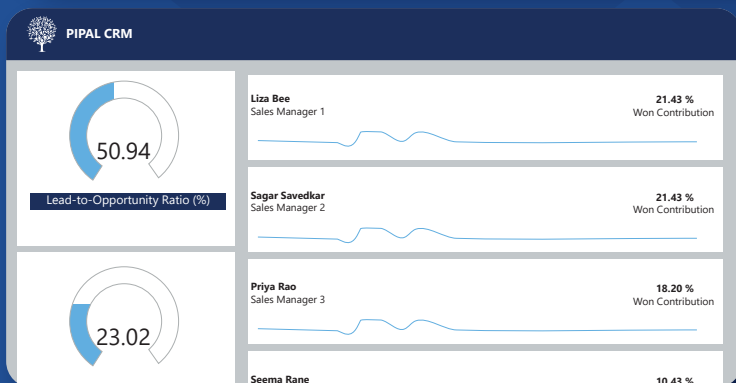
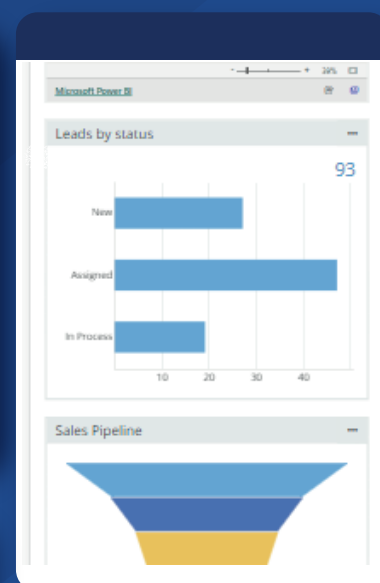
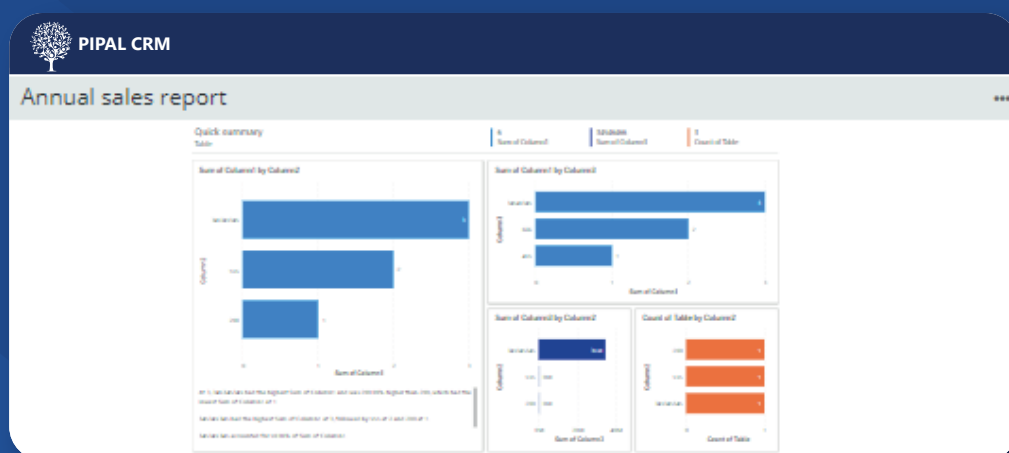
Select

# HARNESS THE POWER OF VISUAL ANALYTICS WITH PIPAL CRM

## Reports and Dashboard

Unlock the power of visual analytics to enable data-driven decision-making, track performance, and drive business growth. Achieve data transparency and enhance efficiency with our intuitive platform—a complete solution for all your reporting needs.

- Intuitive dashboards
- Role based reports
- Easy integration with Power BI
- Lead stages
- Timeline review (contact to closure)
- Service SLA review (complain to resolution)
- Smart customer insight



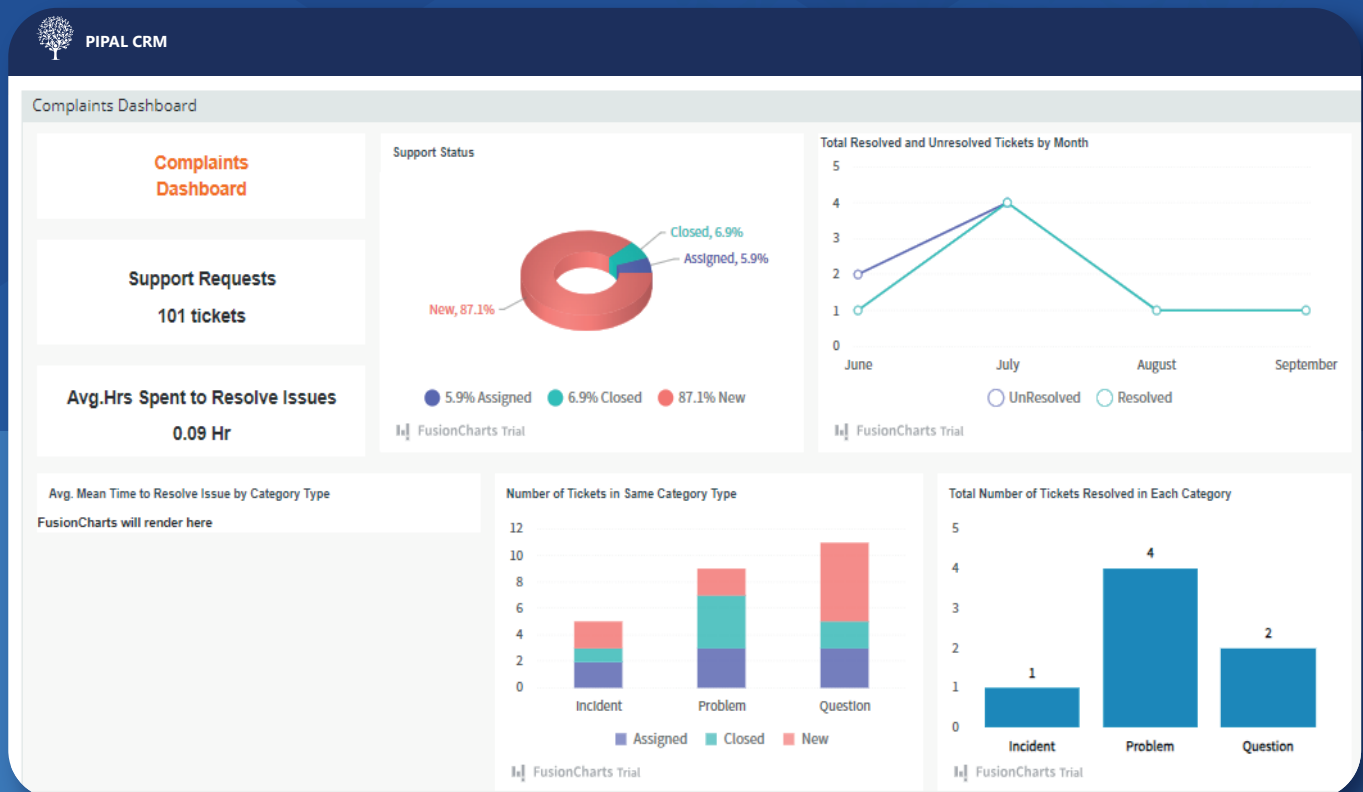
# EXCEED CLIENT EXPECTATIONS BY ELEVATING CASE MANAGEMENT WORKFLOW

## Case Management

- Workflow & automation
- Customer service
- Complaint management
- Manage support ticket and requests
- Manage activities and schedules

## Security

- Two-factor authentication
- Encryption and role based access

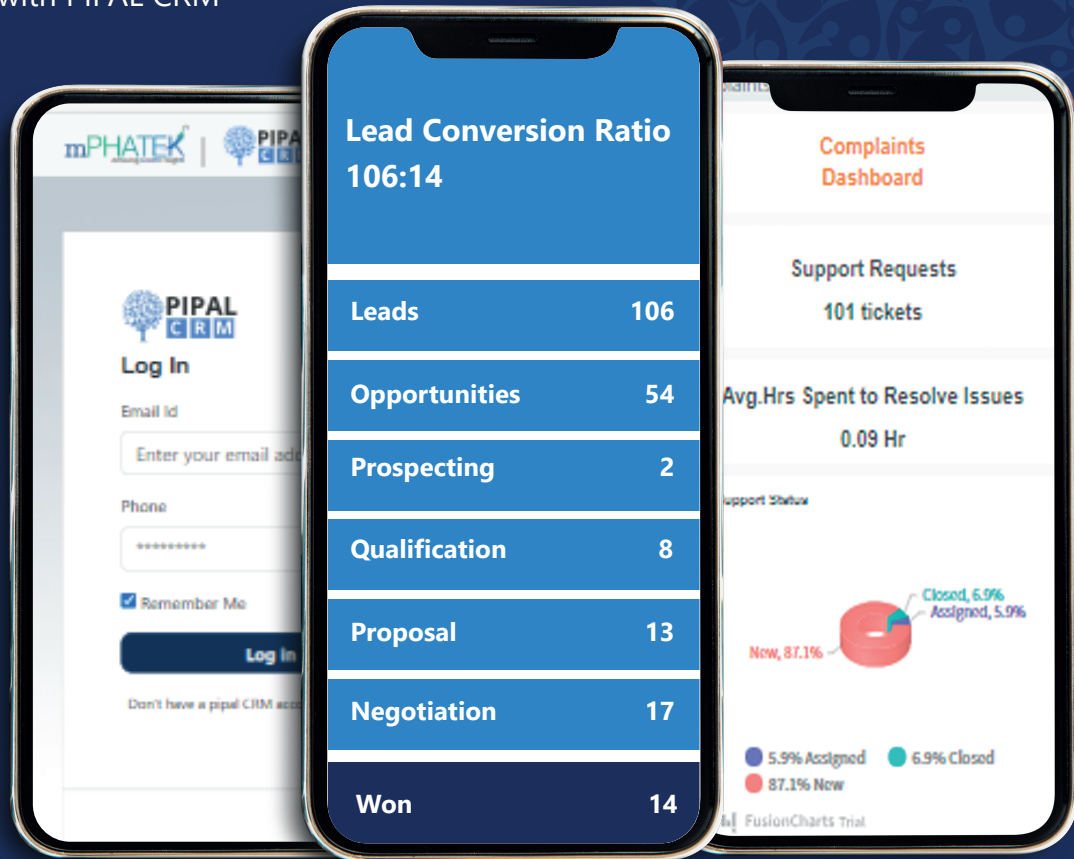


## Customer Journey



# ACCESSIBLE ANYWHERE

Stay on top of your business  
wherever you go with PIPAL CRM



## INTEGRATION

- API based integration
- Integration with other popular app

 Outlook.com

 Calendar

 WhatsApp

 Google Maps

 mailchimp

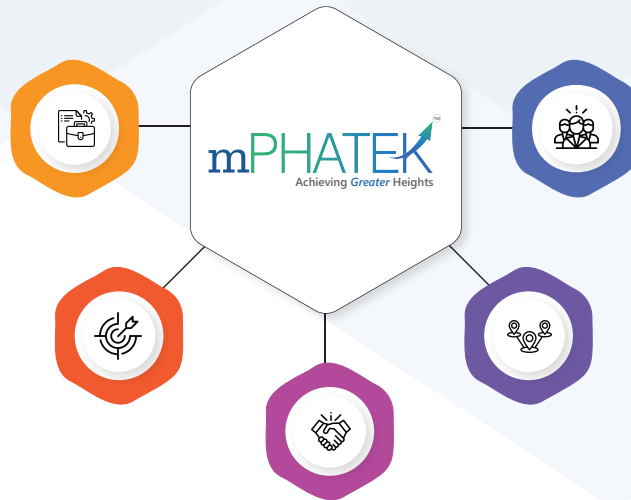
 twilio



## We are Making IT Reliable, Scalable & Powerful

- **10+** Years in Business

- **Industry Focus-** Banking and Financial, Manufacturing, Insurance, Real Estate/ Construction, Defence & Government, Travel, Logistics & Retail



- **100+** Customers across Fortune 500 Enterprises, SMBs, Defence & Government
- **600+** Consultants & Growing

- **5+** Countries with our Global Offices  
India, South Africa, UAE, Canada, USA

- **Partnerships & Accolades**



mPHATEK is one of the key strategic partners to various manufacturing organizations, governments and defense agencies, leading banking, financial, insurance, and retail institutions. We provide cutting-edge solutions and consulting in digital transformation, AI, IoT, big data, and RPA, along with conventional IT services.

**Email:**  
**[contact@mphatek.com](mailto:contact@mphatek.com)**

**Website:**  
**[www.mphatek.com](http://www.mphatek.com)**

**Head Office - India**  
5th Floor, B Wing,  
Pride Silicon Plaza,  
S. No. 106, Near  
Chaturshringi Temple,  
SB Road, Pune,  
Maharashtra - 411016

**USA**  
mPHATEK Systems Inc.,  
8 The Green, Dover,  
Delaware - 19901

**South Africa**  
1st Floor, Aptus House,  
Riverpark, 53, Autumn  
Street, Rivonia,  
Johannesburg - 2128

**Canada**  
mPHATEK Systems Inc.,  
534 Lawrence Avenue  
West, Suite 220 Toronto,  
ON M6A 1A2

**UAE**  
mPHATEK COMPUTER  
SYSTEMS LLC.  
Office No. 21, 30<sup>th</sup> Floor,  
Al Moosa Tower 2,  
Sheikh Zayed Road,  
Dubai, UAE