



Dexciss CRM For ERPNext

From First Lead to Closed Deal — Gain Complete Control



Introduction

Dexciss CRM App for ERPNext is a comprehensive, end-to-end mobile CRM solution built specifically for businesses using ERPNext. It seamlessly connects every stage of the sales lifecycle—from lead capture and customer engagement to opportunity management, quotations, follow-ups, and sales order creation—while staying fully synchronized with your ERP data.

Whether your sales teams operate in the office or on the field, the **CRM App** enables them to manage leads, schedule meetings, log calls, send emails, generate quotations, and track opportunities from a single mobile application. With real-time synchronization to ERPNext, every customer interaction, sales update, and business transaction remains accurate, eliminating duplicate data entry and improving collaboration across departments.

Dexciss CRM empowers organizations with real-time sales visibility, intelligent pipeline management, and mobile-first automation, helping sales teams respond faster, close deals more efficiently, and deliver exceptional customer experiences. From tracking lead progress and managing follow-ups to monitoring salesperson performance through live dashboards and analytics, businesses gain complete control over their sales operations.

Built natively for **ERPNext**, the **CRM App** integrates seamlessly with inventory, finance, and sales workflows, enabling teams to access critical business information whenever they need it. Whether you're managing a growing sales team or scaling operations across multiple regions, Dexciss CRM provides the visibility, mobility, and automation required to drive higher productivity, improve conversion rates, and accelerate business growth.

What Makes Dexciss ERP Sets Apart?

✓ **Native ERPNext integration with real-time sync.**

✓ **Mobile-first, yet fully customizable.**

✓ **Built-in CRM features for complete sales management.**

✓ **Seamlessly integrates with ERPNext and business workflows.**

**10+ Years of
Experience**

**24*7 Customer
Support**

**Global
Presence**

We Understand Your Challenges - Perfectly !

■ **Disconnected Lead Management**

Managing leads across spreadsheets, emails, and multiple tools results in missed opportunities, delayed follow-ups, and poor visibility into the sales pipeline.

■ **Limited Sales Pipeline Visibility**

Lack of real-time pipeline tracking makes it difficult to monitor deal progress, forecast revenue, and identify bottlenecks before opportunities are lost.

■ **Manual Quotation & Sales Processes**

Creating quotations manually and switching between systems slows down the sales cycle, increases errors, and delays deal closures.

■ **Missed Follow-Ups & Customer Engagement**

Without timely reminders and centralized communication, sales teams often miss follow-ups, reducing customer satisfaction and conversion rates.

■ **Inefficient Field Sales Operations**

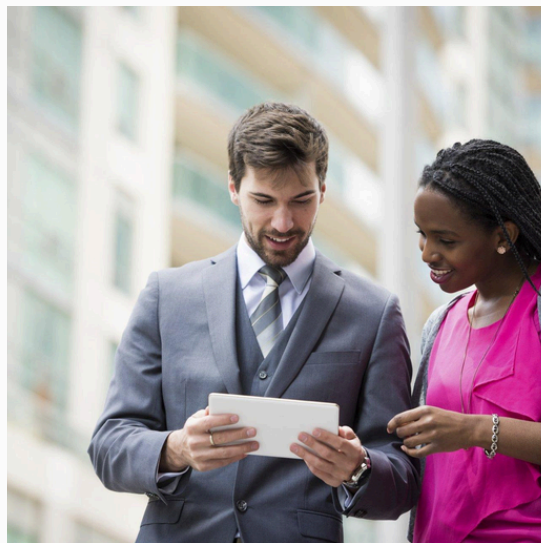
Sales representatives working on the move struggle to access customer information, update meetings, or create quotations without a mobile CRM.

■ **Poor ERP & CRM Integration**

Disconnected CRM systems create duplicate data and inconsistent customer records. Without real-time ERPNext synchronization, teams lack a single source of truth.

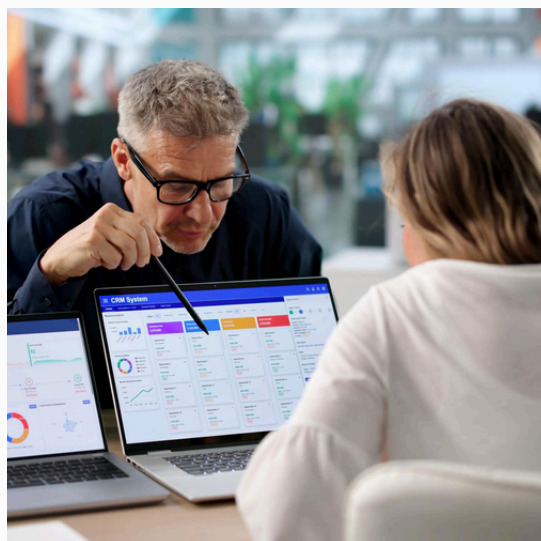
Key Features

Lead Management



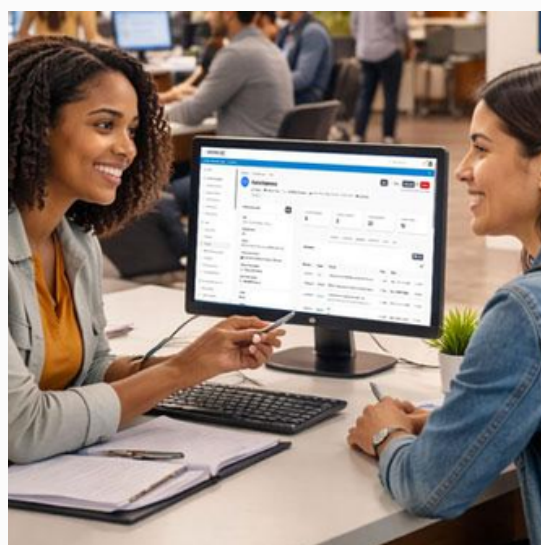
Capture, organize, and track leads from multiple sources with complete visibility into every stage of the customer journey, ensuring no opportunity is missed.

Opportunity Management



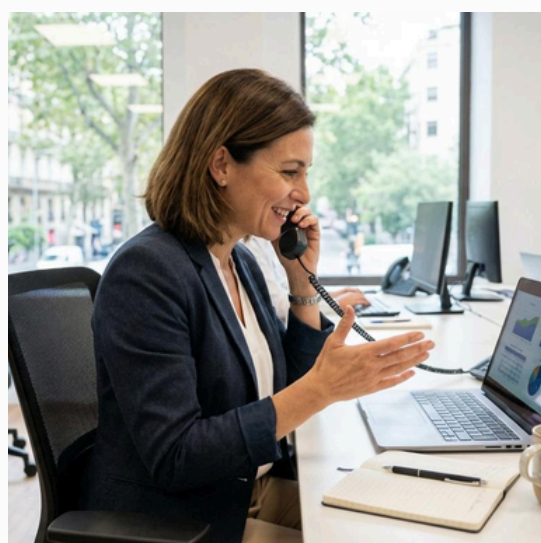
Convert qualified leads into opportunities, monitor deal progress, and manage your sales pipeline efficiently to close deals faster.

Meeting & Task Management



Schedule meetings, assign follow-ups, and manage daily tasks with reminders to keep your sales team organized and productive.

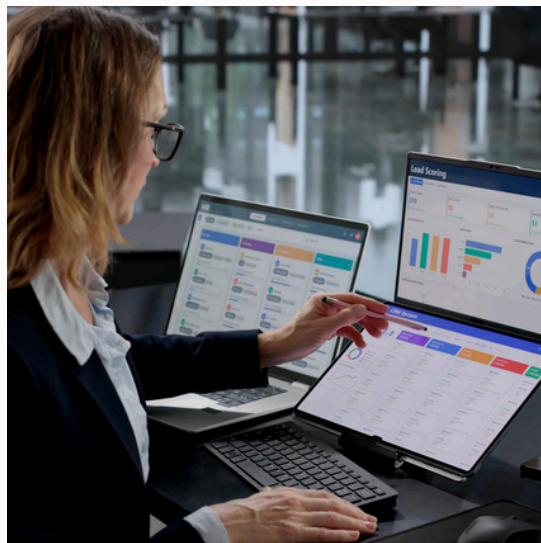
Call & Email Logging



Record customer calls, emails, and communication history in one place to maintain complete interaction timelines for every prospect.

Key Features

Quotation Management



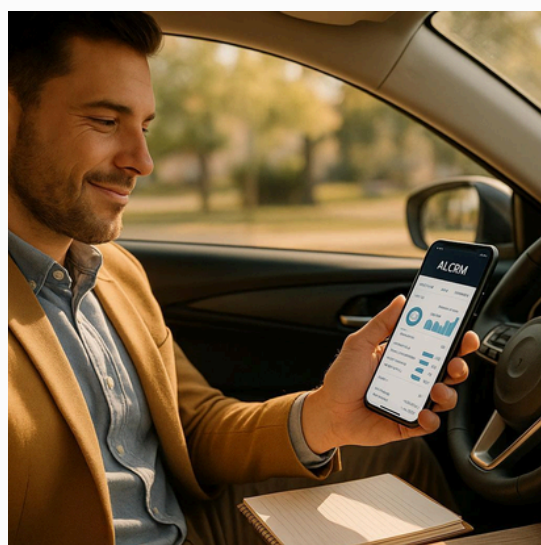
Generate professional quotations directly from the CRM App, track revisions, and speed up the sales process with seamless ERPNext integration.

Sales Pipeline Tracking



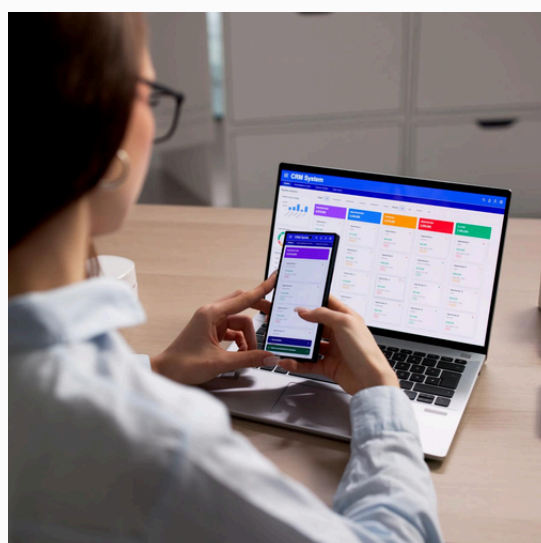
Monitor Hot, Warm, and Cold leads with real-time pipeline visibility, helping sales managers prioritize opportunities and improve forecasting.

Mobile CRM for Field Sales



Empower field sales teams to access customer data, update meetings, capture leads, and manage opportunities from anywhere using Android and iOS devices.

Real-Time ERPNext Synchronization



Keep customer records, quotations, sales orders, and business data synchronized instantly with ERPNext, eliminating duplicate data entry.

Key Features

Customer Activity Timeline



Maintain a complete history of meetings, calls, emails, quotations, and follow-ups to provide better customer engagement and faster decision-making.

Sales Dashboards & Reports



Enable sales teams to collaborate seamlessly by sharing customer information, activities, and opportunity updates across departments.

Customizable CRM Workflows



Adapt lead stages, sales processes, forms, and workflows to match your organization's unique sales operations without disrupting ERPNext integration.

Real Benefits, Real Success



Accelerates lead
conversion and
sales growth



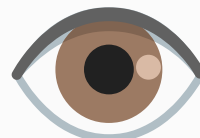
Improves follow-up
efficiency



Enhances customer
relationship
management



Increases sales team
productivity



Provides real-time
sales visibility



Eliminates duplicate
data entry



Strengthens sales
team collaboration



Enables faster
decision-making



Delivers accurate
sales forecasting



Contact Us for More Information About Dexciss CRM App for ERPNext



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