

INFINTIY ECM PLATFORM

Overview of primary and support systems

Support systems	Basic platform system - companies, contacts, product and service catalogs, events, tasks, monitoring activities, chat, notifications, search ...										
	360 ° client view - advanced view of companies and contacts across all subsystems, e-mail tracking, monitoring of employees and monthly work.										
	Records and Case management with DMS – Mils, Letters and documents, case files, delivery notes, archive, shipping, documentation borrowing, etc.										
	File management - portal for file storage, organization approach, DMS and integration with cloud services for data storage (Google Drive).										
	Integration web service system - mutual integration of Infinity platform systems, integration with a variety of external systems (ERP, 3CX, Microsoft, Google).										
	Infinity Administration system – users management, user roles, teams, module settings, organizational units, notification, codebooks, security, layouts, etc.										
Primary systems	MARKETING Marketing campaigns, leads, contacts, mass messaging (e-mail, fax, SMS) telemarketing, follow-up, distribution lists, sending templates, integration with external systems (mailJet, InfoBip), marketing reports.	SALES Presales activities, sales opportunities, sales funnel, sales tasks, sales events, offers + making offer from templates, personalization record sales activity, collaboration, Kanban sales view, sales reports.	CONTRACTS Frame contracts, contracts, related purchase orders, independent purchase orders, contracts hierarchy, personalization, tracking allocation by contracts and order forms, reminders of expiration dates, approval and verification, reports.	PROJECTS Managing project programs, management project, teams, project phases, work orders, tasks and work records by tasks (work-logs) project risks, Gantt diagram, deliveries, planning, tracking realization.	BILLING Outbound & inbound invoices with invoice validation. Fiscalization, billing via email, full and partially cancellation of invoices, creating invoices from templates, links to contracts and sales offers, reports.	HELPDESK Service desk types of support (Incident, Change, Problem & User specific management). Prioritization by SLA, knowledge base, specialist teams, e-mail information to the client and team of specialists.	WAREHOUSE Receipt of goods, goods issue with dispatch leaves, ordering goods, return of goods, transfer note support for more warehouses, write-offs of goods, stocktaking goods on warehouse, review purchase price, review Margins.	e-SESSIONS Managing of different kind of sessions, session cover page portal with details, review points of the agenda, conclusions overview, inviting participants via email, delivery of digital materials, discussions.	CALL CENTAR Call logs submitted to landline VoIP phones and softphone, Integration with PBX VoIP digital telephone, cross point multiple calls, desktop integration through CRM plugin with display of contact who called.	ASSET Management Tangible and intangible assets, different types of assets. Record data about insurance, maintenance, locations , financial information, notification and dates, assigning digital documentation; asset life cycle; monitoring types of ownership and lease of assets; hierarchical view.	Savings