

TAM CRM is complete Customer Relationship Management software that is a great fit for almost any company, freelancer or many other uses. With its clean and modern design, TAM CRM can help you look more professional to your customers and help improve business performance at the same time.

Managing customers is important and TAM CRM helps in several ways:

- Manage and invoice projects with the powerful Project Management Feature.
- Link tasks to many TAM CRM features and stay organized.
- Build professional, great looking estimates and invoices.
- Powerful support system with ability to auto import tickets.
- Track time spent on tasks and bill your customers. Ability to assign multiple staff members on task and track timer per assigned staff.
- Add task followers even if the staff is not project member. The staff member will be able to track the task progress without accessing the project.
- Keep track of leads in one place and easily follow their progress. Ability to auto import leads from email, add notes, create proposals. Organize your leads in stages and change stages easily with drag and drop.
- Create good looking proposals for leads or customers and increase sales.
- Records your company/project expenses and have the ability to bill to your customers and auto convert to invoice.
- Know more about your customers with powerful CRM.
- Increase customer retention via built-in Surveys.
- Use the Goals Tracking feature to keep sales goals in mind.
- Create announcements for your staff members and customers.
- Use Contracts feature to lock in current and future sales.
- Custom fields can store extra information for customers, leads and more.
- Receive payments from Paypal and Stripe in different currencies.
- Tons of configurable options.
- Style the CRM to your company branding with the powerful theme styling feature.
- Separated media folder for non-admin staff members to work inside the CRM and organize their uploads and files.
- Great looking calendar for each staff member based on staff permissions.
- Follow ups, reports, notes, files and many more features.

CRMs need to focus on customers and TAM CRM does that with a powerful support system that helps you track and resolve issues quickly via the integrated ticket system and customer reminders. Assign reminders to yourself, one or many staff members and with one click, reminders can be sent to email and in-app notification system. These features and more can take customer satisfaction to the next level.

Customers

Easily manage your customers and their contacts, create multiple contacts for your customers and set proper permissions. Customers area is fully separated from the admin area. Clients have their own client portal with all financial data from your company presented in clear view.

Invoices

Tam crm allows you to keep in track your invoices, items and generate reports. Add new currencies, using multiple currencies is allowed by previously setup customer currency. Invoice with different tax based on item.

Recurring Invoices

Create recurring invoices that will be re-created automatically without you lifting a finger, based on the specified period for the recurring invoice. The period time could be days, weeks, months or years.

Recurring Expenses

Creating recurring expenses. Set up a recurring expense and the expense will automatically be re-created after the specified period. The period time could be days, weeks, months or years

Estimates

Create estimate within a minute, sent to your customers and wait to accept, add notes for better organization for your next actions, create reminders. Ability to auto convert the estimate to invoice after customer accept.

Proposals

Create good looking proposals for leads or customers and increase sales. Receive notification when proposal is accepted/declined and auto send thank you email to your customer after accepting the proposal. Proposal overdue notice before X days available.

Online Payments

Receive payments from Paypal, Stripe, Mollie, Authorize.net, 2Checkout, PayU Money and Braintree, we have implemented payment gateways that are available in most of the countries.

Projects

Manage projects and track time spent on project for each staff member. Record project expenses and invoices and bill your clients faster. Professional Gantt Chart included for each project and staff member.

Milestones

Create milestones for projects and track time spent based on milestone. Ability to Drag and Drop tasks between milestones.

Leads

Leads or potential clients are really important part to any company. Every company trying everyday to get new leads. Very often happend some potential client to call and ask for specific service that you company serve and then sometimes this is forgotten. With Tam CRM you will never forget your potential clients and you will be able to manage all of them in one place. Keep track of leads in one place and easily follow their progress. Ability to auto import leads from email, add notes, create proposals. Organize your leads in stages and change stages easily with drag and drop. Ability to auto import leads from emails and web to lead forms, import leads from .CSV file included.

Web to Lead Forms

Create unlimited web to lead forms and inject in your landing page or website. This feature allows you to import leads into Tam CRM from form. Use web to lead forms to gather potential clients information, allow them to request quotes directly from your website.

Contracts

You can add new contracts based on your clients. Adding contracts is very simple, you can set start date and end date and have clear view of all your company contracts in one place. You won't need anymore to search in your desk documents.

Create PDF contracts and send to your customers from Tam CRM. Contract overdue reminders available.

Tickets

Great support ticket system with autoresponse, private ticket staff notes, ticket assignments, attachments, predefined ticket replies, insert knowledge base link, ticket priorities, ticket statuses. Feature for auto importing tickets via Email Forwarder/IMAP method included. Let your customer reply and create new tickets via email, without accessing the client portal.

Departments

Assign your staff to specific departments and ability to auto import tickets by department email.

Custom Fields

Custom fields can store extra information for customers, leads, tickets, invoices, company, estimates and more.

Staff Reminders

Setup staff reminders for staff member with ability to notify by email and built-in. Reminders are available for important features.

Theme Styling without coding

Style the CRM to your company branding with the powerful theme styling feature. To fit best for your needs create custom.css and add your own styles.

Events

Create private or public events. Receive notification when an event is coming built-in and email.

Easily re-organize admin menu

You can re-organize admin main menu and the setup menu from in few seconds, you need only to login in your admin area. No coding is required. Add/Remove icons to fit for your needs.

Email Templates

Setup predefined email templates from text editor. Merge fields available and multi language options available.

Staff Roles & Permissions

You can give staff a specific permissions what can do or can't do. Role permissions can be overided for each staff.

Goals Tracking

Setup goals and tracking achievements. Use the Goals Tracking feature to keep sales goals in mind.

Personal Todo

Every staff member can have their own personal todo dashboard which will allow your staff member to easily organize the their work.

Staff

Manage all your staff members from one place.

Company Newsfeed

Share great company events, upload documents, easy employee communications.

Staff Tasks

Assign task to multiple employees, add task followers, task comments allowed, task attachments. Link tasks to many Tam CRM features and stay organized.

Recurring Tasks

Create tasks that will be auto created for a given period.

Surveys

Create surveys with one click. Send to staff, leads, clients or manually created mail lists. Increase customer retention via built-in Surveys.

Reports

Reports

Sales

Expenses Report

Reports by customer

Custom date picker

Leads Conversions

Knowledge base articles (Track if your article is usefull to clients, improve text based on votes)

Knowledge Base

Add knowledge base articles from text editor. "Did you find this article useful?" vote included in clients area.

Media Library

Upload files in media library. Each staff member that is not admin have their own folder for uploading files.

Auto Backup Database

Setup auto backup database each X days to prevent losing your important data.

Sensitive data is encrypted

Tam CRM encrypts all sensitive data in the database with unique encryption key. Encryption performed on email passwords, api keys, api passwords etc..

Server Side Datatables

Tam CRM is using serverside datatables to perfectly handle large databases.

Responsive

Tam Crm is fully responsive. You can easily access your data from mobile or tablet.

Google reCaptcha

Google reCaptcha available for admin login, customer login and customer register area.

Action Hooks

To prevent editing the core files we created action hooks for some important functionalities. Send us an email if you want we to include another action hook based on your needs.

Activity Log

Track all staff activity. Adding new items, creating, deleting.