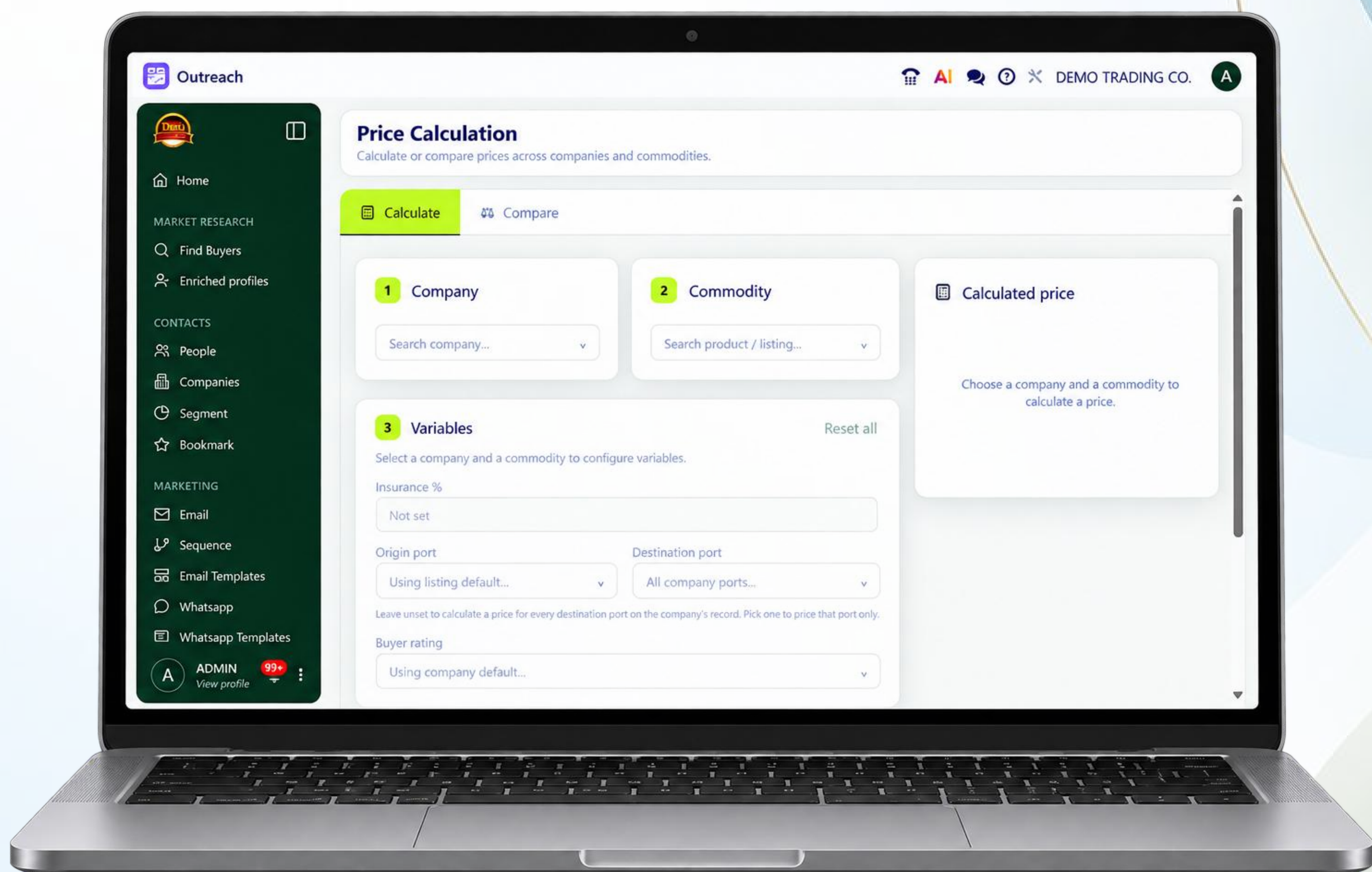




Smart CRM & Procurement

Find the buyer, reach them with today's price, book the order in Odoo.



A buyer list is only as good as the day it was built. Contacts move on, companies change the commodities they handle, and the price sitting in last month's mailer is no longer the price.

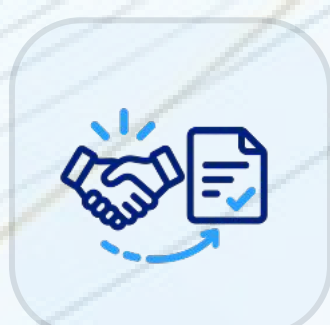
Smart CRM works the other way round. Buyers are found by commodity and export market, their details enriched on demand, and a price emailer pulls current prices from the backend as the template is built. Follow-ups run themselves over email and WhatsApp until someone replies.

Three Pillars



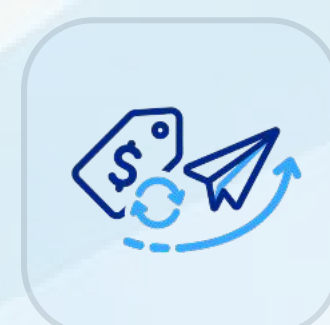
Buyers Found By Commodity

Search traders and companies by target market, export region and the goods they actually handle.



Won Deals Become Sales Orders

Marking a deal won converts it into an active sales order inside Odoo.



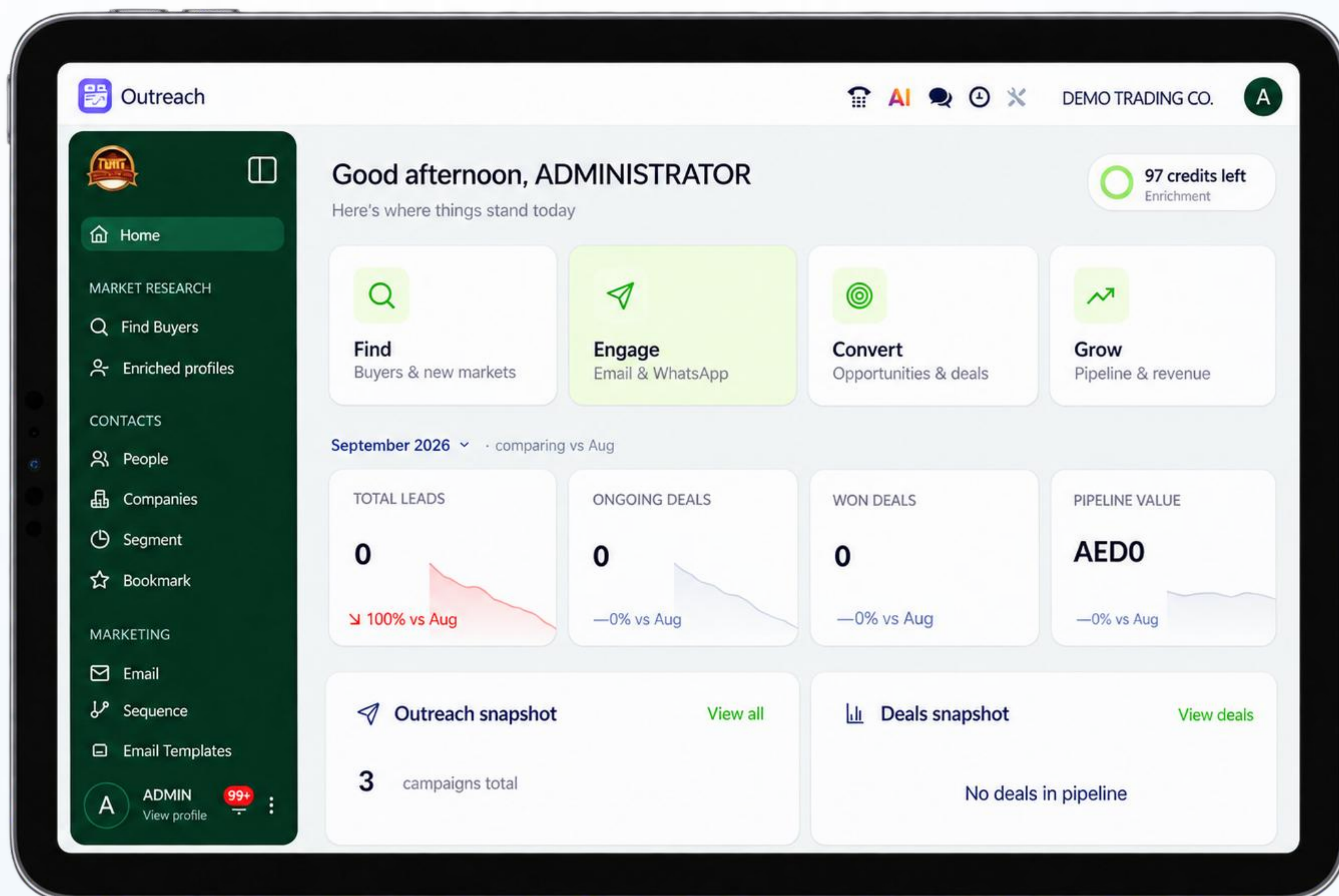
Prices Current On Send

Price update emailers fetch the latest backend commodity prices into the message at template stage.

All interface screenshots and data shown in this brochure are simulated and for illustration only.

Home Screen

The day starts on one screen, with four ways into the work and the pipeline numbers in view.



Key Feature Modules



Find, Engage, Convert, Grow

Four buttons opening discovery, outreach, the live pipeline and the sales order cycle.



Discovery Funnel

How many prospects entered, how far they travelled and where they stopped.



Snapshot Cards

Leads, ongoing deals, won deals and pipeline value as live counts.



Enrichment Credits

Available lookup credits shown live, so a research session is planned against what is left.

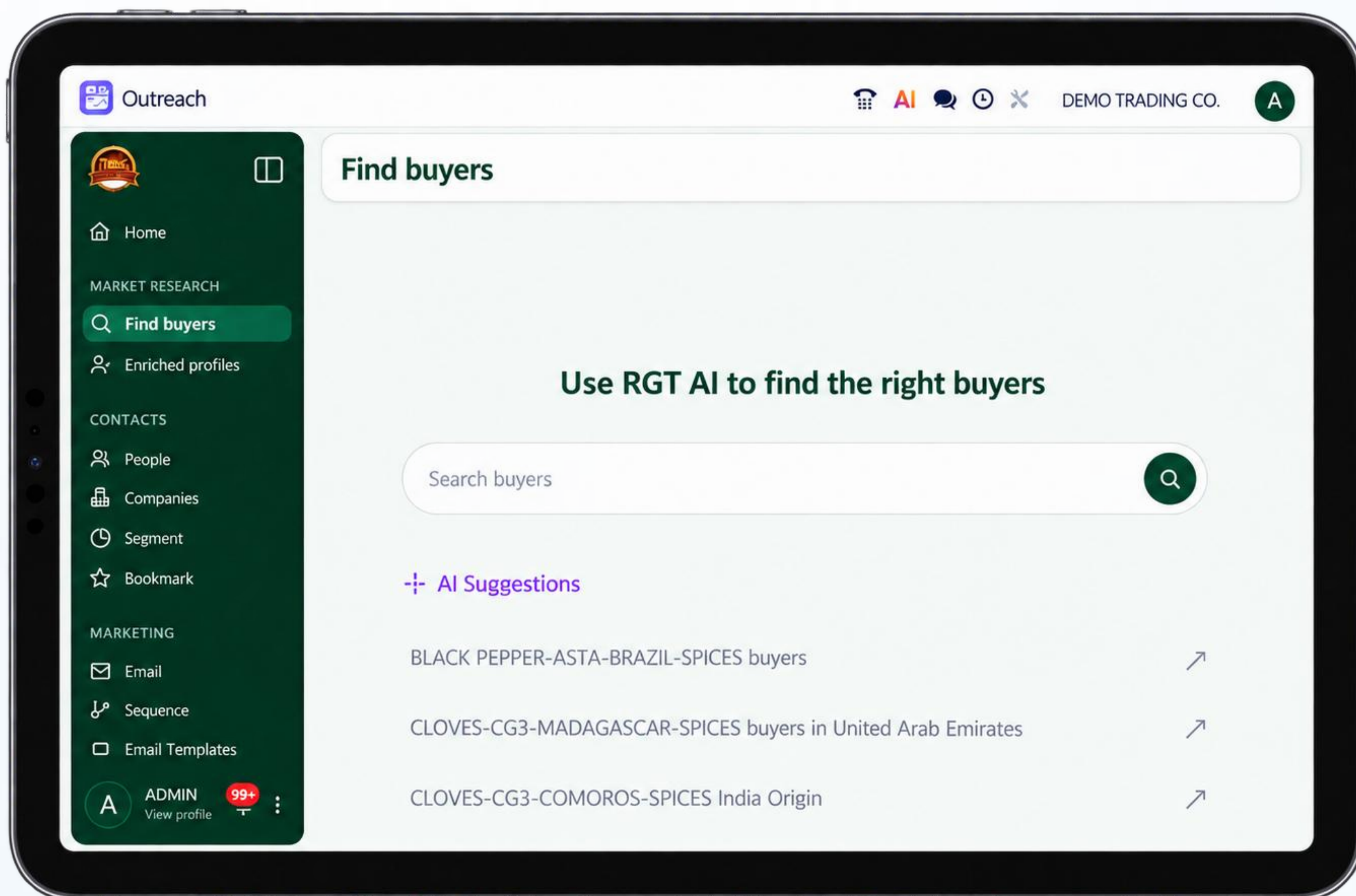


Buyer Geography

Top countries and buyers by country map where demand concentrates and which markets are thin.

Find Buyer

A prospecting engine that searches the way a trader thinks, by commodity and by market.



Key Feature Modules



Search By What They Paid

A search for cardamom buyers in the Gulf returns names that actually handle cardamom.



Saved Into The Workspace

Selected entities import straight into the database under People and Companies.



Enrich a Person

Direct contact details, commodities dealt in and companies dealt with regularly.

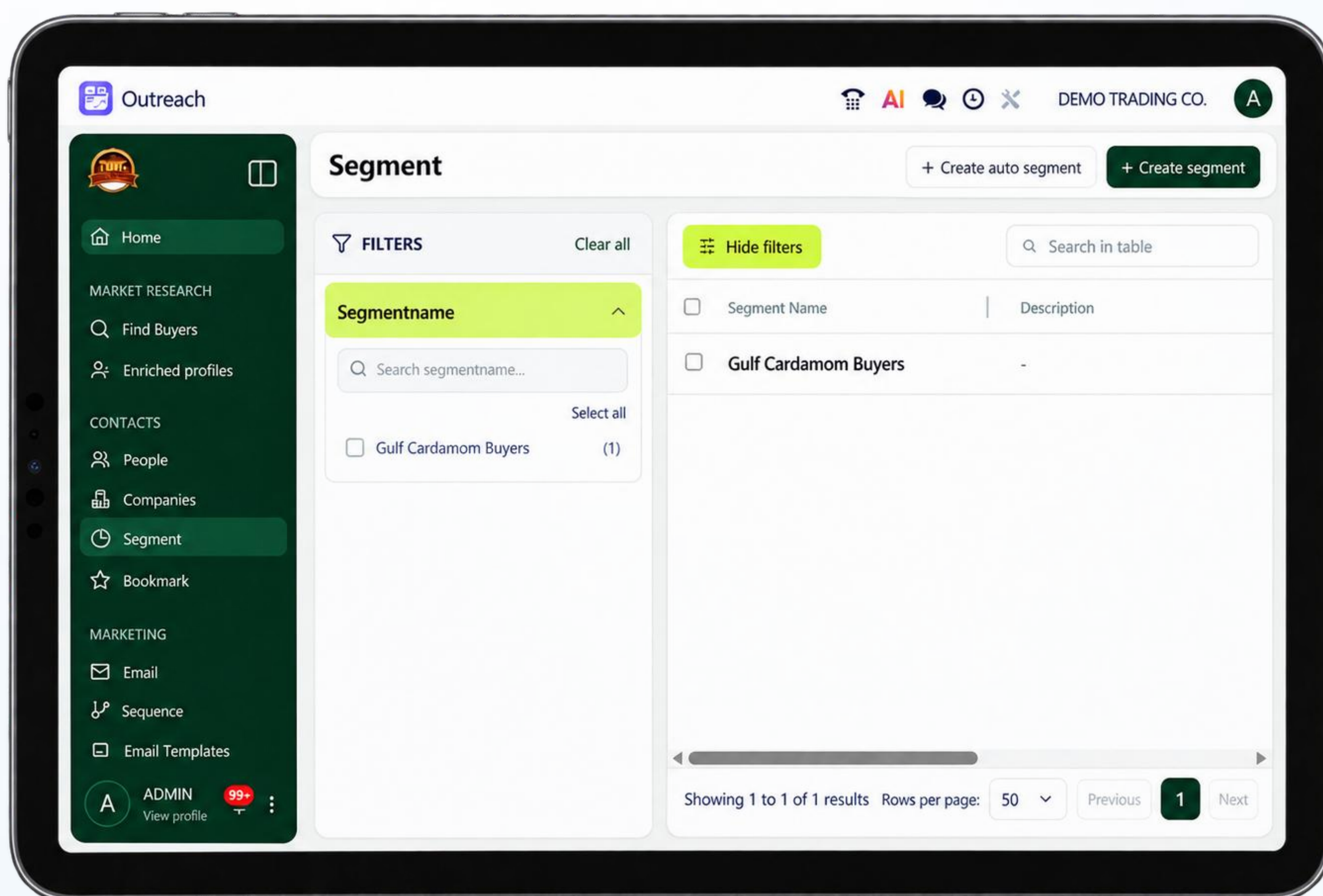


Enrich a Company

Employee directory, primary trading countries and trade revenue insight, enough to judge if the account takes the volume.

Segments

Build focused audiences around the products, regions and trade relationships that actually matter.



Key Feature Modules



Multi - Condition Filtering

Combine commodities, regions, headquarters and trade territories to create precise contact groups.



Narrow Beats Broad

Target messages to specific buyer groups, so every outreach feels relevant to the market they operate in.

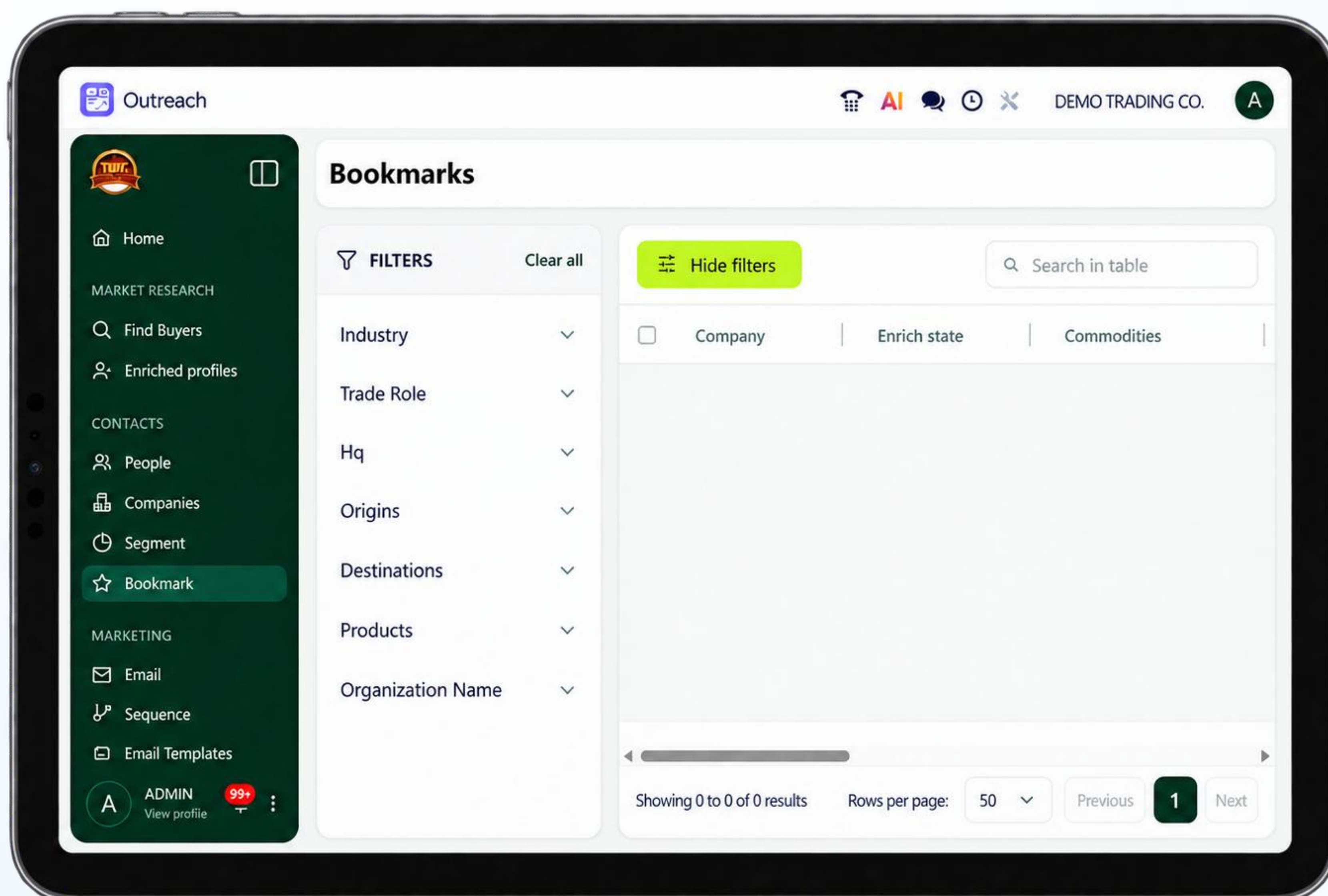


Straight Into Campaigns

Save segments once and reuse them directly across email and WhatsApp campaigns.

Bookmarks

Keep important traders, companies and priority prospects within easy reach.



Key Feature Modules



Pinned Accounts

Bookmark frequently contacted buyers, traders and companies for quick access.



Priority Leads Close By

Keep high-value prospects visible while they move through active outreach and pipeline activity.

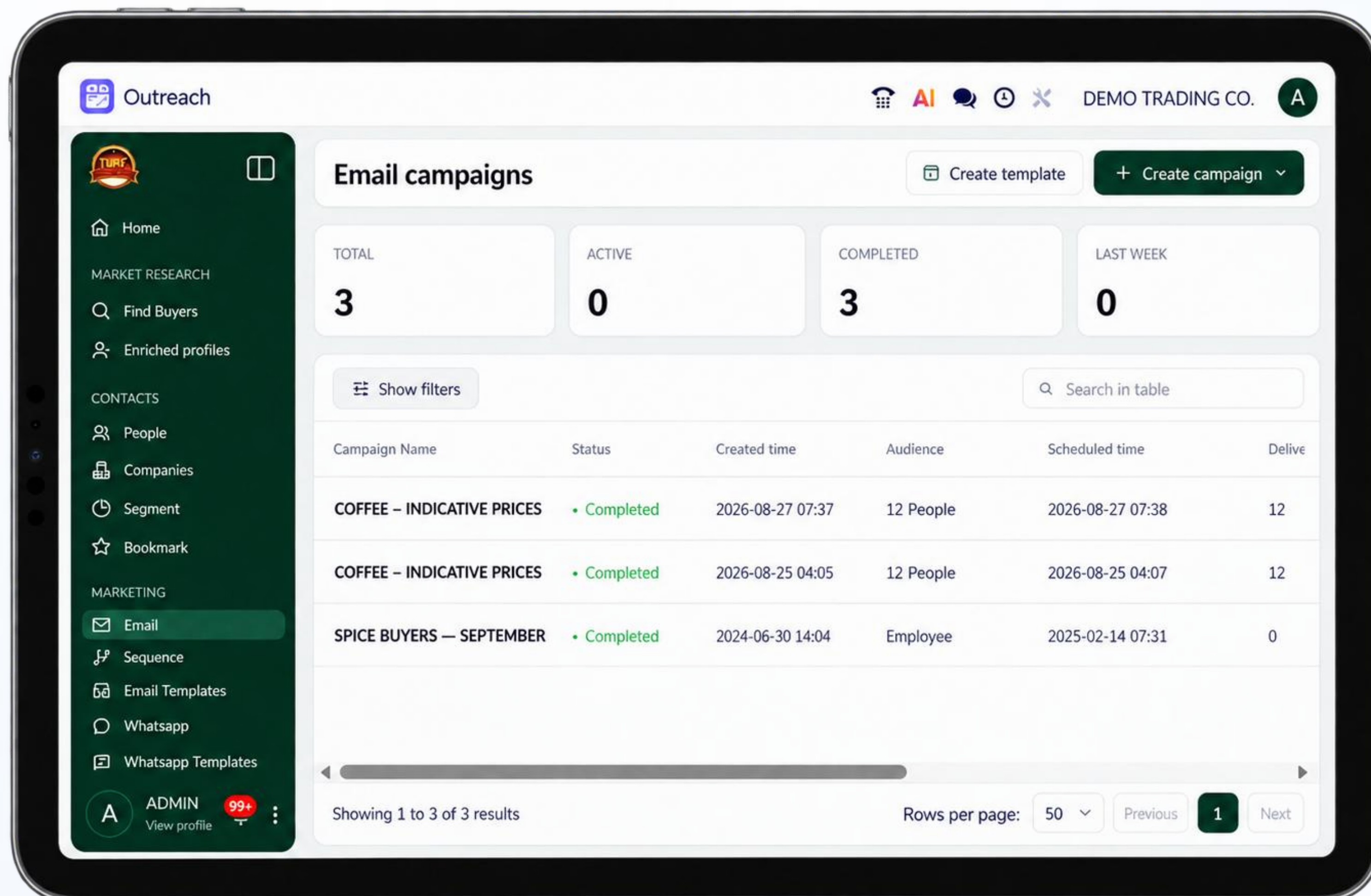


Ready When You Need Them

Return to saved accounts instantly without repeating searches or rebuilding filters.

Outreach Campaigns

Email and WhatsApp run from the same place, to the same audiences, with results coming back live.



Key Feature Modules



Audience From Segments

Campaigns target a saved segment, specific people or specific companies, on either channel.



Price Update Emailers

Pick the commodities at template stage and current backend prices populate the message, so the quote sent is the quote on the books.



Templates Either Way

Plain text and HTML on email, pre-configured templates on WhatsApp.



Scheduled Dispatch

Exact date and time per campaign, which matters when the message must land in another market's working hours.

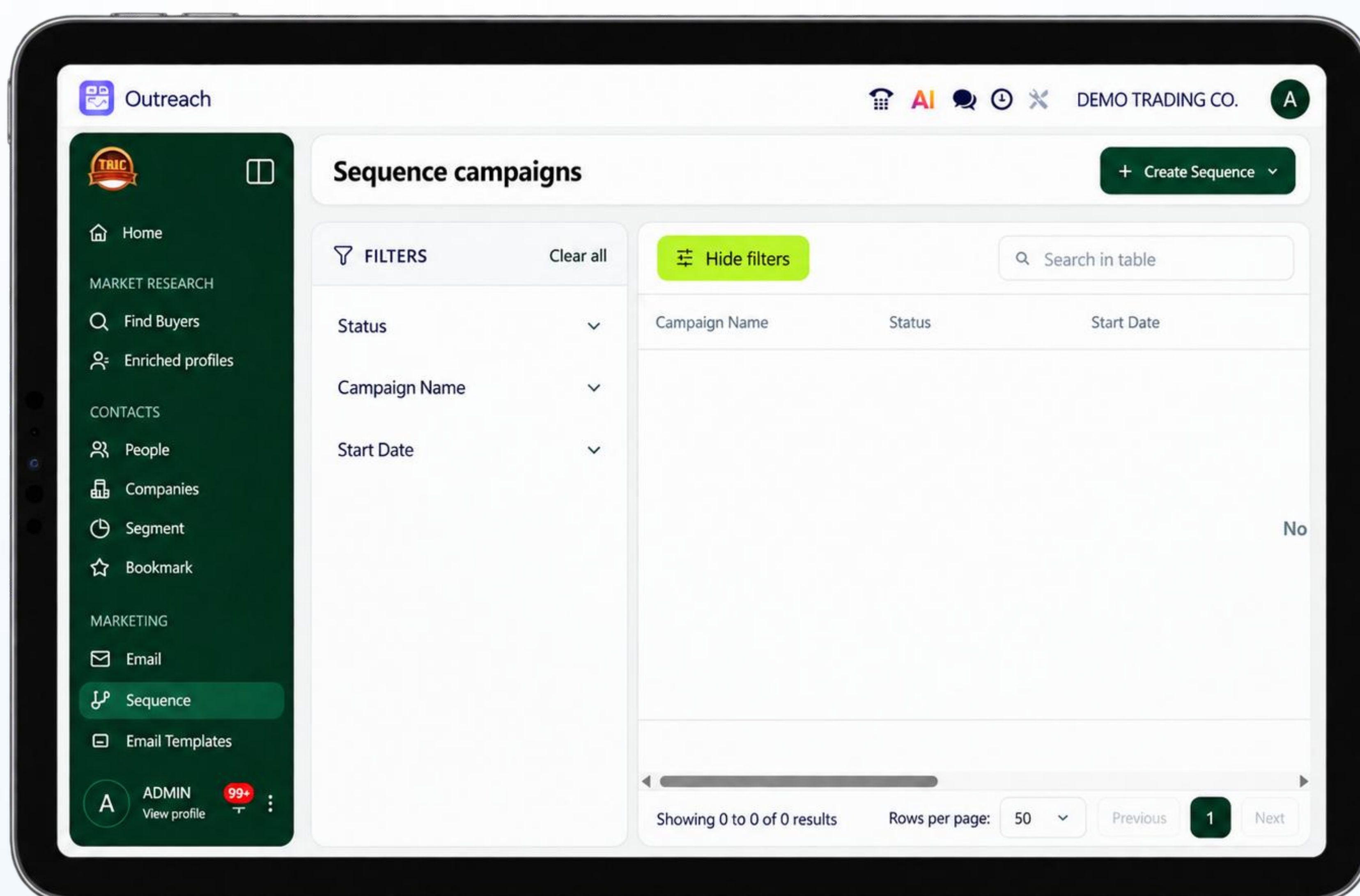


Campaign Insights

Delivered, read, clicked and failed, tracked through to meetings and opportunities generated.

Sequences

Follow-ups that fire on behaviour, so an unopened email does not become a forgotten prospect.



Key Feature Modules



Email Sequences

Follow-ups trigger when a message goes unopened or unanswered past a set duration.



Whatsapp Sequences

Automated follow-ups go out when a contact has not responded inside their window.



Hybrid

A sequence opens on email and switches to WhatsApp if the email is never opened, reaching people who work their phone.

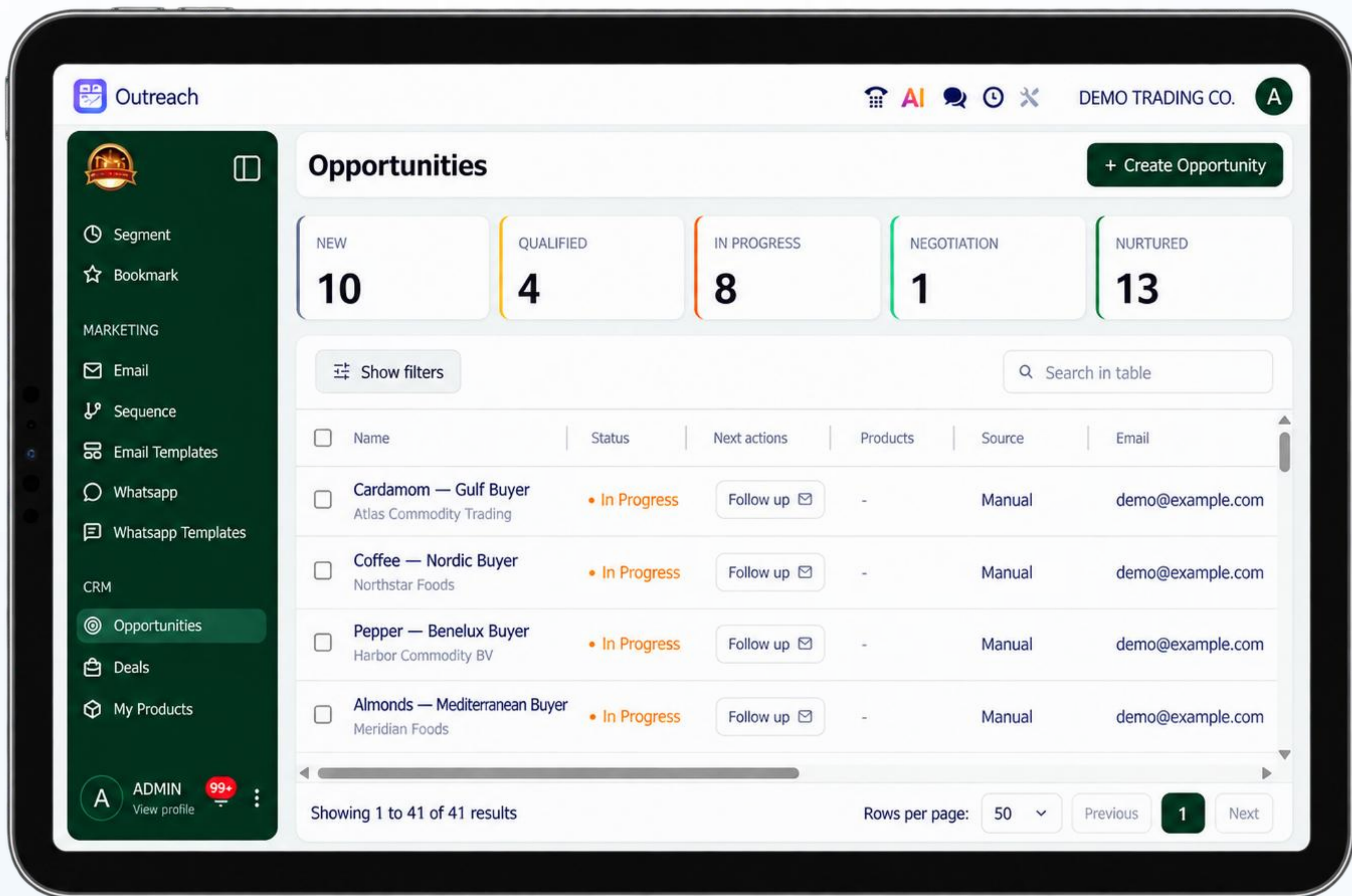


Timers & Rules

Waiting durations in hours or days, with behaviour rules deciding what triggers next.

CRM Pipeline & Odoo

Opportunities tracked to a close, and a won deal that lands in the ERP as a sales order.



Key Feature Modules



Pipeline Stages

New, Qualified, In Progress, In Negotiation and Nurtured, so a stalled prospect shows as a stage rather than a silence.



Activity Logging

Status sits with the actions it needs, keeping the next step attached to the opportunity.



Deals With Numbers on Them

Qualified opportunities logged with deal value, status, date and products.

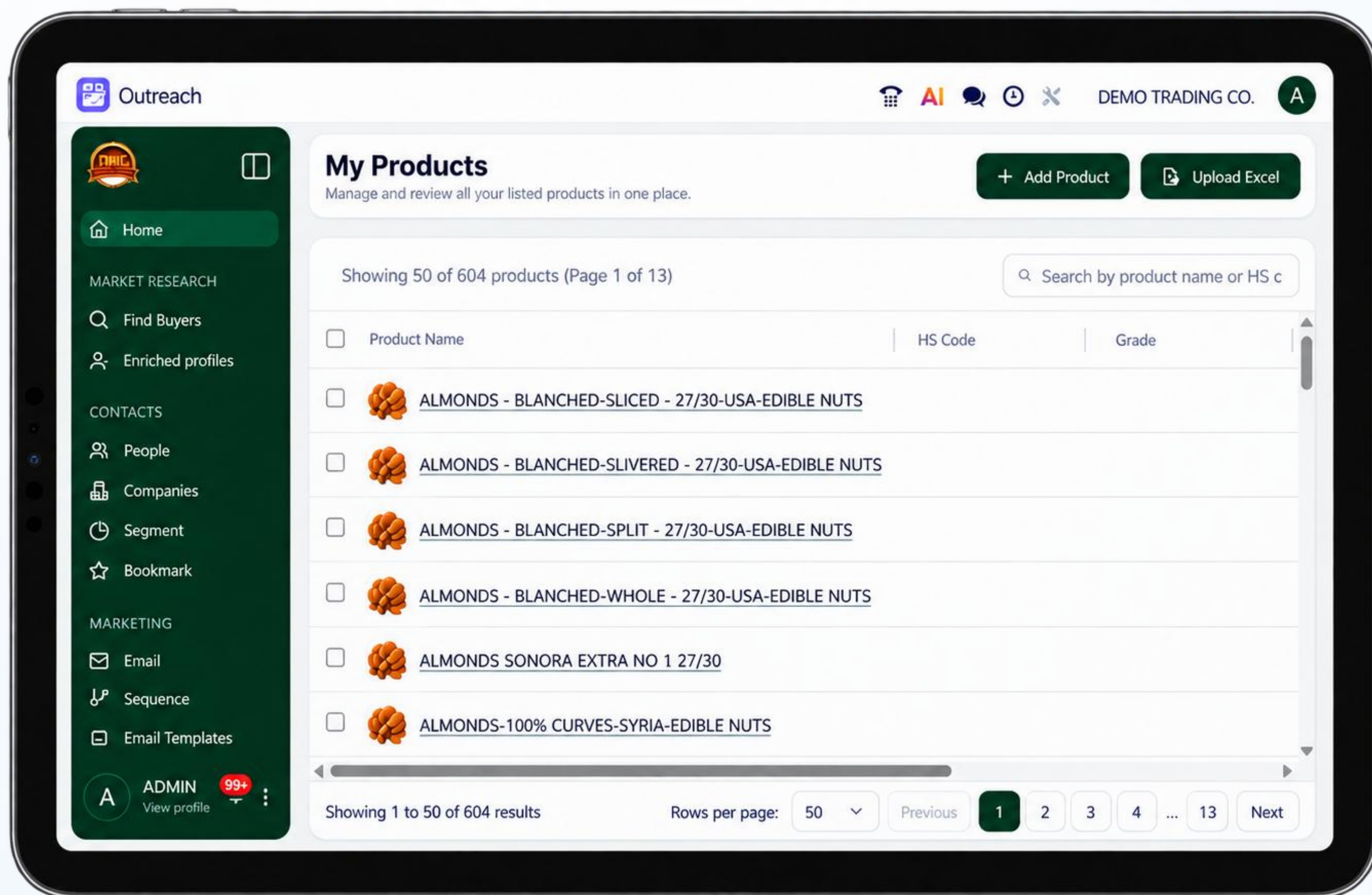


Won Becomes a Sales Order

Conversion into Odoo is automatic, closing the gap where a won deal waits to be re-keyed.

My Product & Pricing

The catalogue that feeds the campaigns, and the calculator that works out what to quote.



Key Feature Modules



Product Catalogue

Trader products stored with live baseline market pricing, which the outreach templates draw on.



Pricing Calculator

Select company, commodity and trade variables to generate the exact selling price for that prospect.



Priced Per Prospect

The same commodity goes out at the price that fits each relationship, not one rate for the whole list.



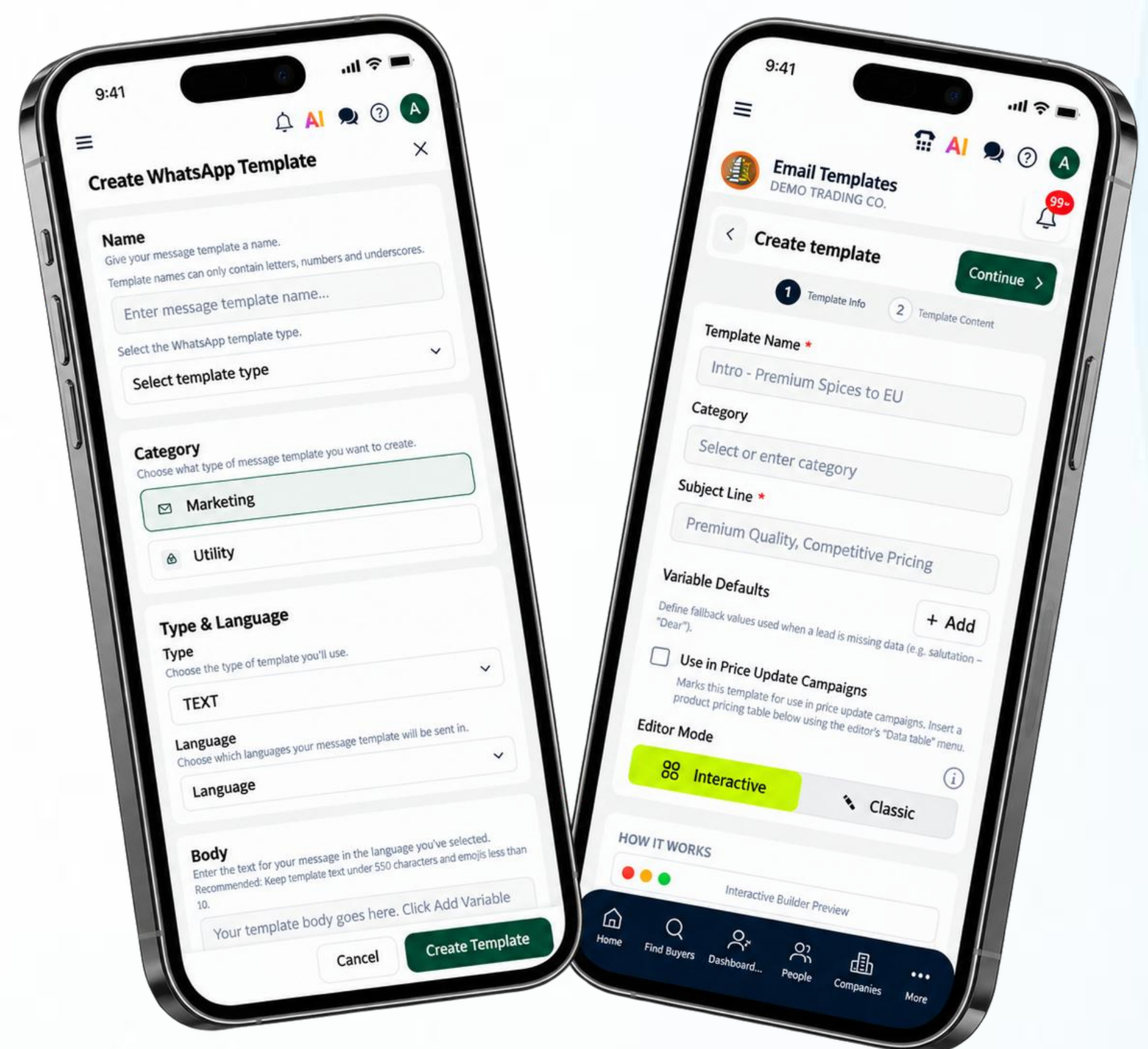
Catalogue & Campaign Aligned

Pricing updated in the catalogue is the pricing the next campaign sends.

From a cold search to a Sales Order

Find the buyer, reach them with today's price, book the order in Odoo.

Speed up buyer communication with ready-to-send templates, consistent follow-ups, and a clear path from search to sales order.



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BOOK A DEMO



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