TruDrive Sync

CORE FEATURES

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Introduction

TruDriveSync is a comprehensive Enterprise Resource Planning (ERP) solutions that integrates your CRM, project management, sales, lead generation, and marketing in a single platform designed to streamline business operations and enhance client interactions. This is a detailed spec book that outlines the core components and features of TruDriveSync.

Our software is customizeable by inudstry, so if you're interested in a custom package, contact our sales team using the "Customize Your System" form on our website.

Core Features

TruDriveSync ERP is a powerful all-in-one platform designed to streamline and centralize your business operations. By integrating key functions into a single system, TruDriveSync enables your team to work more efficiently, make smarter decisions, and drive growth.

These features are standard on every deployment.

- CRM
- Project Management
- Sales Management
- Invoicing
- Payment Integrations
- Estimates & Proposals
- Contracts
- Detailed Calendar
- Pre-defined Sales Items
- Leads Management
- Expenses
- Company Newsfeed
- Surveys & Reports
- Goal Setting & Tracking
- Announcement
- Client Portal with Support
- Internal & Client Knowledge Base
- Sales, Income, and Expense Reports

With its user-friendly interface and customizable workflows, TruDriveSync ERP simplifies complex processes, giving your business the flexibility and insights it needs to thrive.

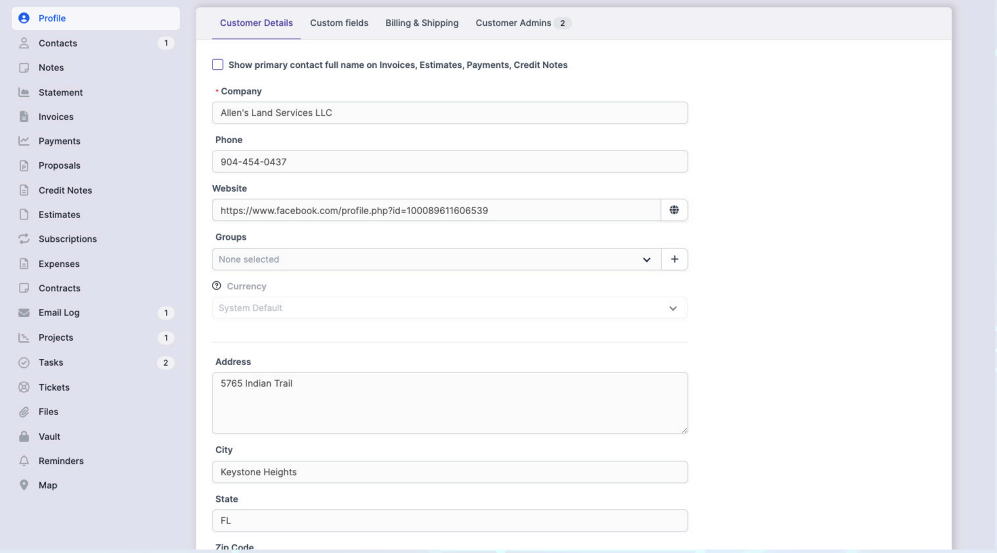
Let's dive into each feature...

Customer Relationship Management

Effortlessly manage customer relationships and interactions to drive sales and improve client satisfaction. The CRM component provides a centralized platform for tracking leads, customers, and communications.

Features:

- Maintain detailed customer profiles with contact information, history, and preferences.
- Organize leads using a simple Kanban board to monitor their journey through the sales pipeline.
- Set automated follow-ups and reminders to stay on top of client interactions.
- Record and track all client communications, ensuring your team is always aligned.
- Convert leads into customers seamlessly and track their progress within your system.



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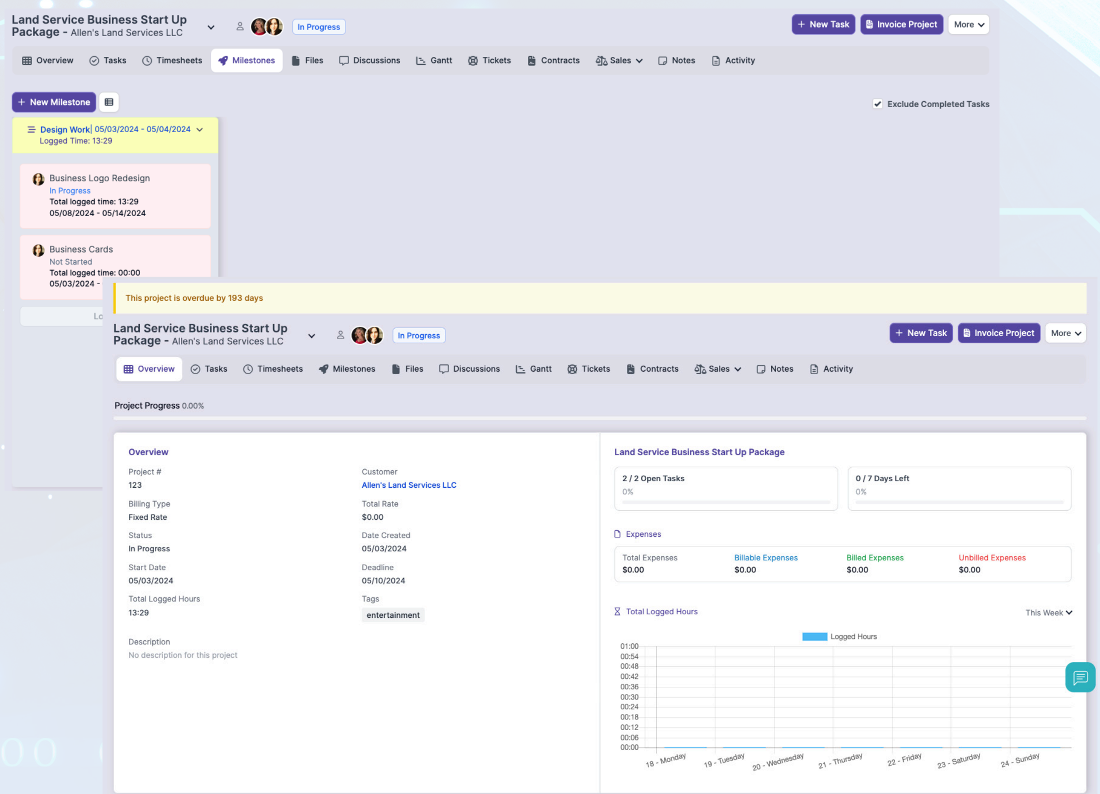
TruDriveSync

Project Management

Efficiently manage projects from start to finish with tools that simplify planning, tracking, and collaboration. Keep your team aligned and projects on schedule.

Features:

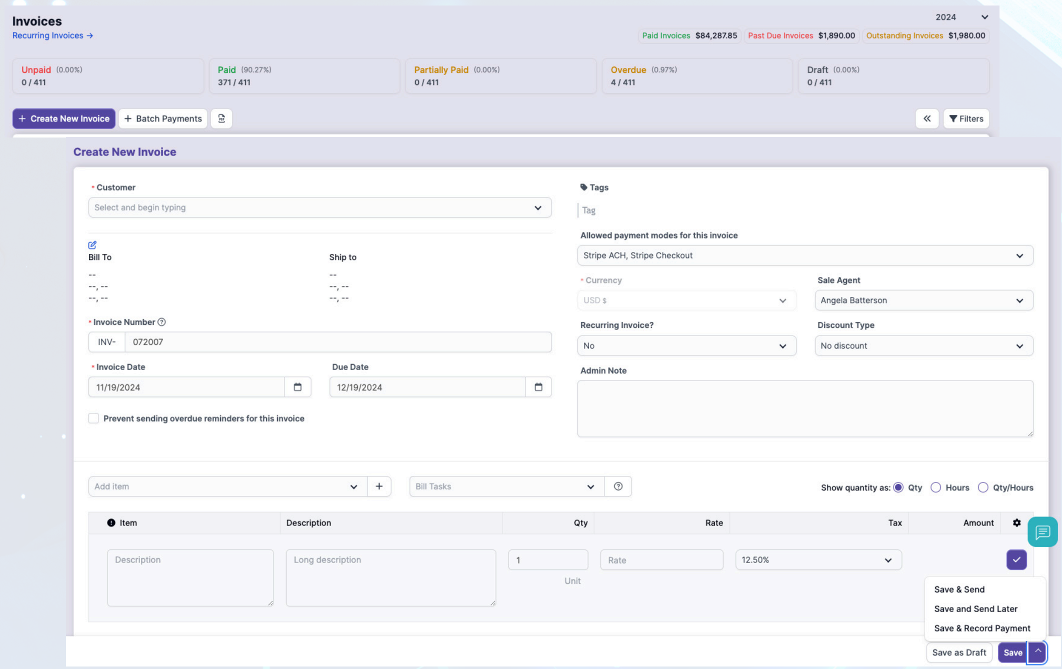
- Assign and monitor tasks with clear timelines and progress tracking.
- Log time spent on tasks to improve accountability and resource management.
- Manage budgets, expenses, and project costs in one centralized location.
- Collaborate effortlessly with team members and assign multiple staff to tasks.
- Generate project invoices quickly and accurately, ensuring smooth client billing.



This tool helps streamline workflows, enhance productivity, and deliver projects on time and within budget.

One-Click Invoice Creation

Create professional invoices in seconds with customizable templates and seamless client communication. Simplify your billing process and get paid faster.



Features:

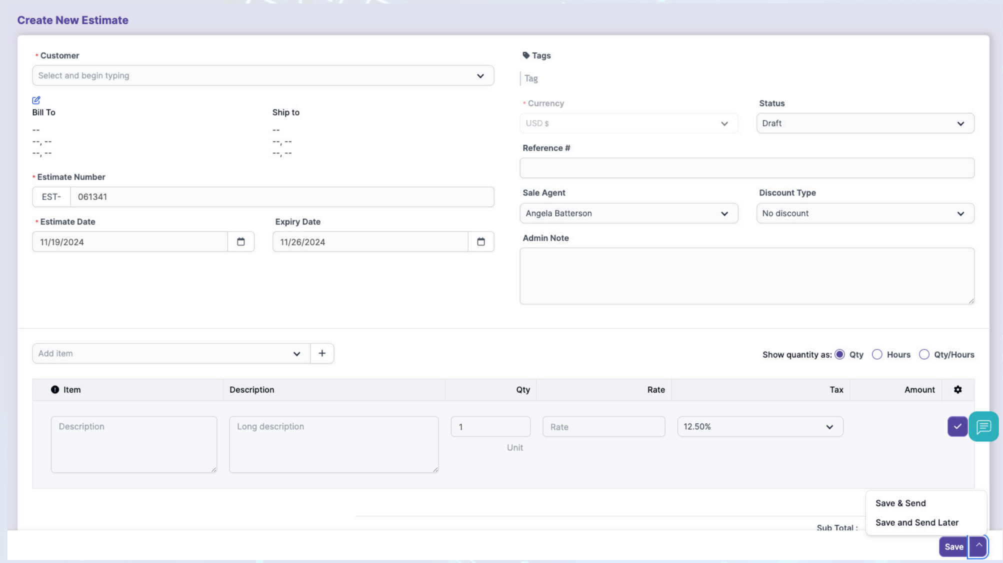
- Generate and send invoices with a single click, including PDF attachments.
- Apply multiple tax rates and customize itemized billing.
- Automate recurring invoices with flexible frequency options.
- Track payments and outstanding balances for accurate financial records.

Estimate Creation

Quickly generate detailed estimates that turn opportunities into deals. Simplify your sales process with easy-to-use templates and client approval tracking.

Features:

- Create estimates and send them directly to clients for approval.
- Automatically convert approved estimates into invoices.
- Allow clients to view and interact with estimates via the client portal.
- Customize templates with branding and itemized details.

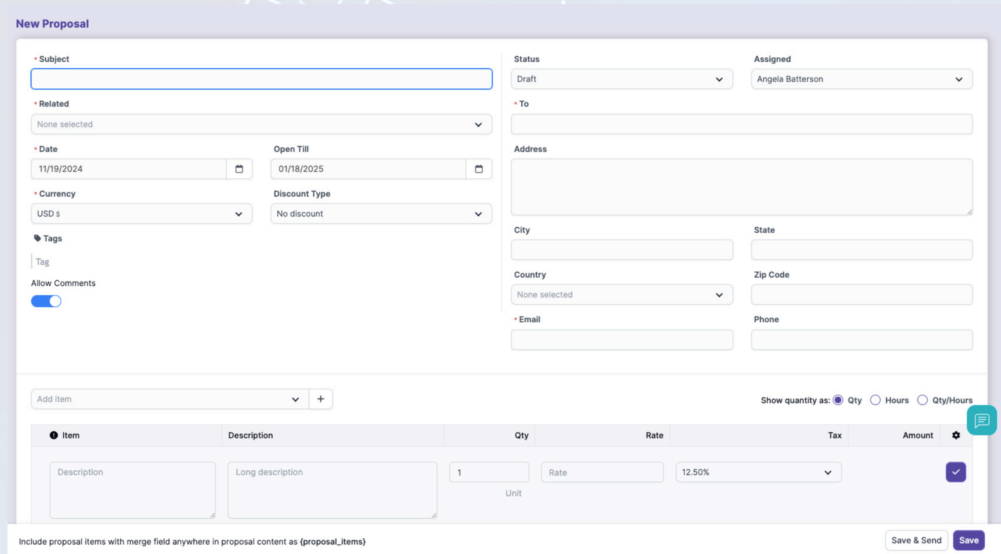


Proposal Generation

Create winning proposals that impress clients and secure business. Add multimedia elements and comments to make your proposals engaging and actionable.

Features:

- Use a flexible editor to add images, tables, and embedded videos.
- Send proposals directly to clients and enable comments for collaboration.
- Include interactive sections to streamline client approvals.
- Track proposal statuses to follow up efficiently.

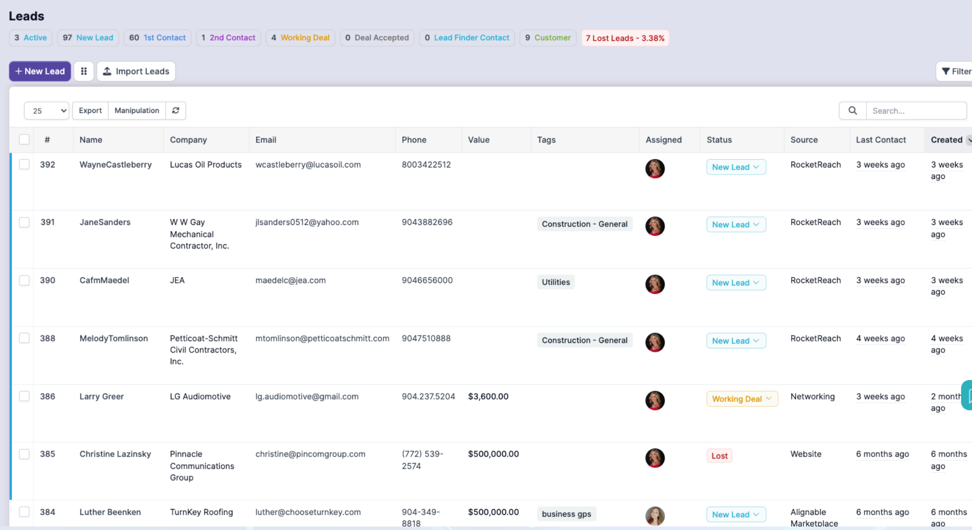


Leads Management

Track, nurture, and convert leads into loyal customers. Stay organized and close deals with an intuitive, centralized lead management system.

Features:

- Visualize lead progress with a Kanban board.
- Automatically import leads from emails and other sources.
- Attach files, add notes, and set follow-up reminders for leads.
- Convert qualified leads into customers with seamless integration into the system.

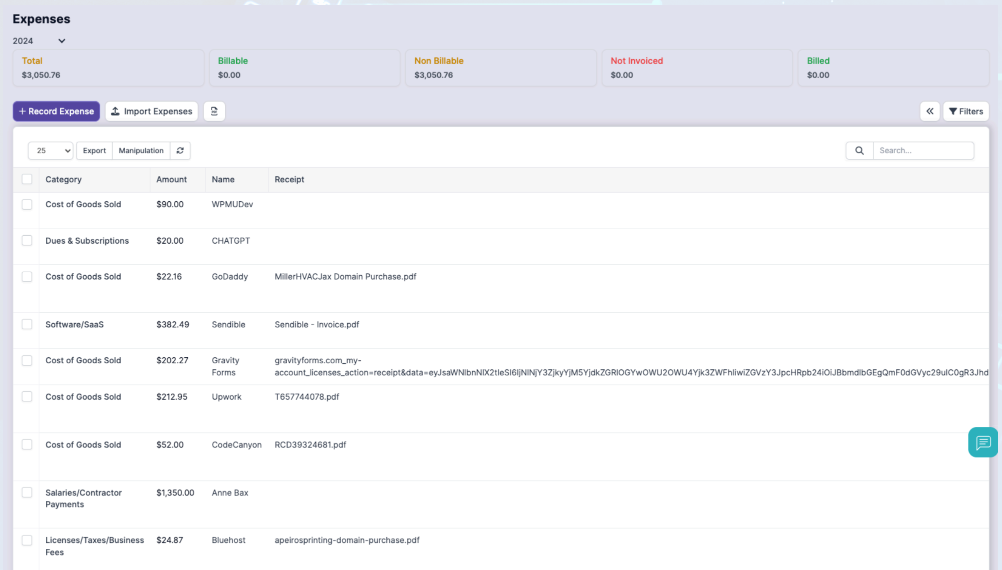


Expense Recording

Keep track of company expenses with ease. Ensure accurate financial records and transparency with intuitive tools for expense management.

Features:

- Record and categorize expenses for better financial visibility.
- Automate recurring expenses with customizable schedules.
- Mark expenses as billable to customers or projects for accurate invoicing.
- Attach receipts and relevant documentation to expenses.

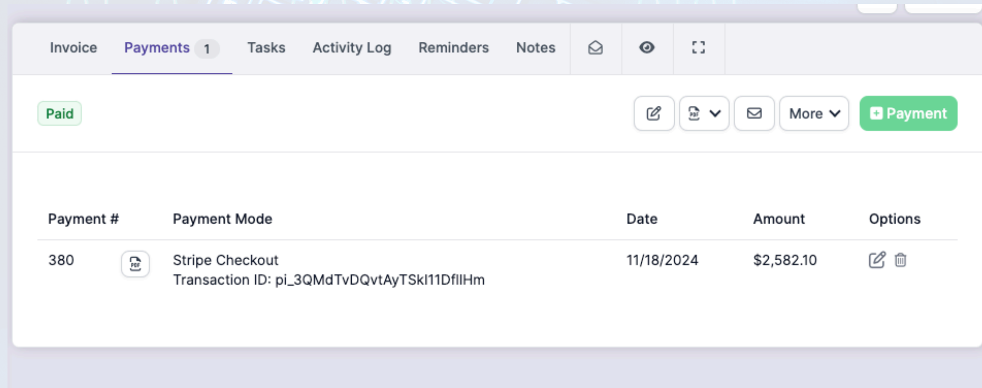


Payment Recording & Gateways

Streamline payment processes with multiple gateways and real-time tracking. Record payments with ease and maintain accurate financial records.

Features:

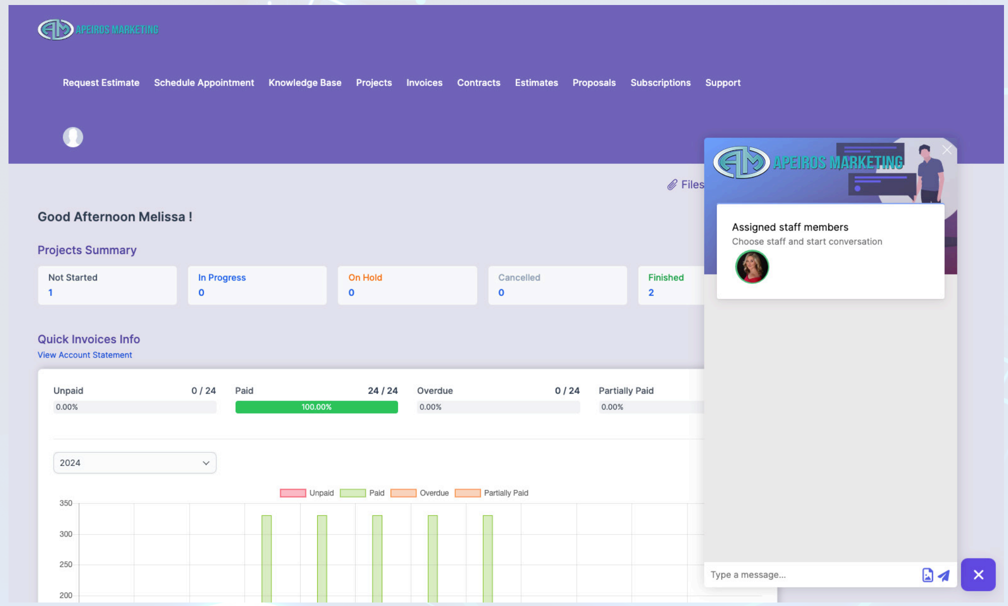
- Accept payments through integrated gateways like PayPal, Authorize.net, and Stripe.
- Record payments in various currencies with automatic conversions.
- Generate payment receipts as PDFs for clients and internal records.
- Track payment statuses and ensure timely follow-ups.



TruDriveSync

Client Portal & Support System

Provide your clients with a personalized portal for seamless communication and support. Offer transparency and exceptional service every step of the way.



Features:

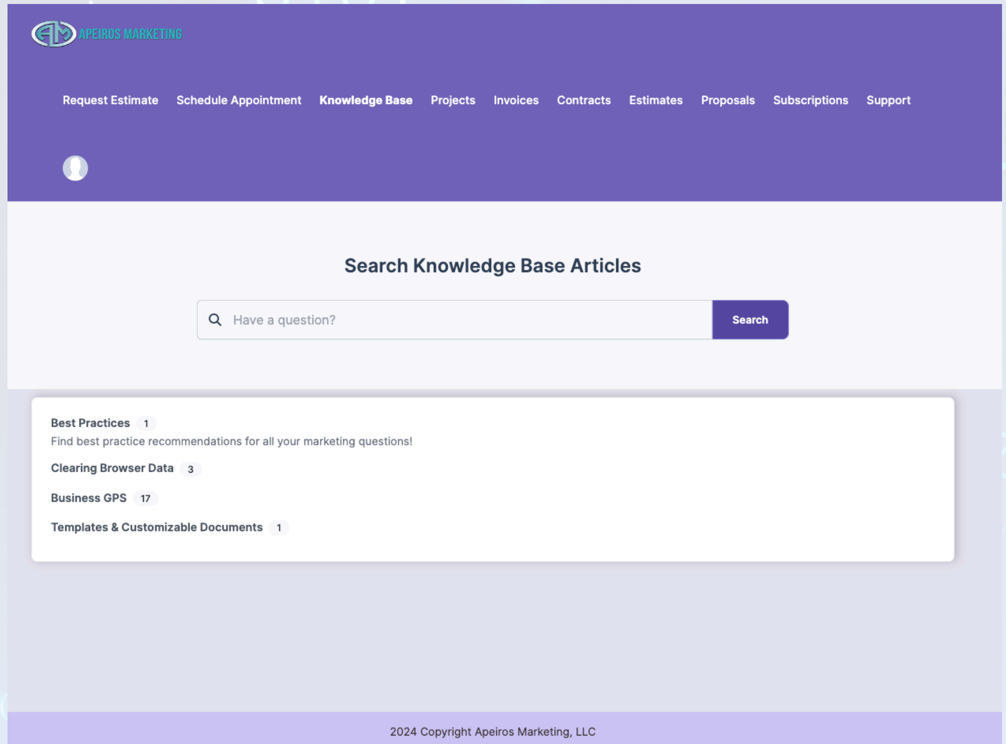
- Enable clients to access invoices, contracts, and support tickets.
- Use an automated ticketing system to manage client inquiries.
- Offer predefined replies and attach files for quick issue resolution.
- Track support metrics and improve client satisfaction.

Knowledge Base

Empower clients and staff with a centralized library of helpful resources. Reduce support requests by providing self-service answers.

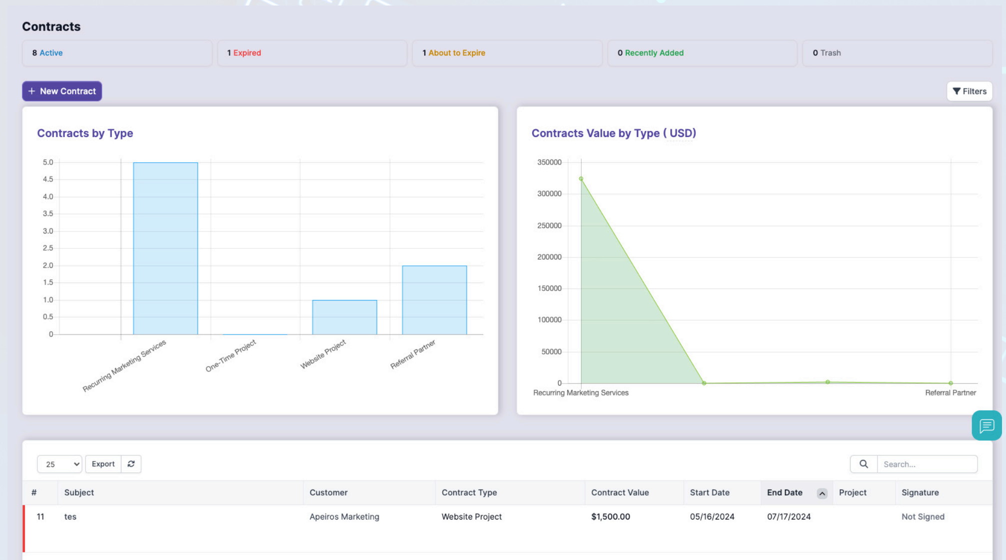
Features:

- Create and organize articles with a user-friendly text editor.
- Enable “Did you find this article useful?” voting for client feedback.
- Allow clients to search and access articles through the client portal.
- Regularly update resources to improve efficiency and reduce inquiries.



Contract Management

Simplify contract creation, tracking, and renewals. Keep agreements organized and never miss a deadline with automated reminders.



Features:

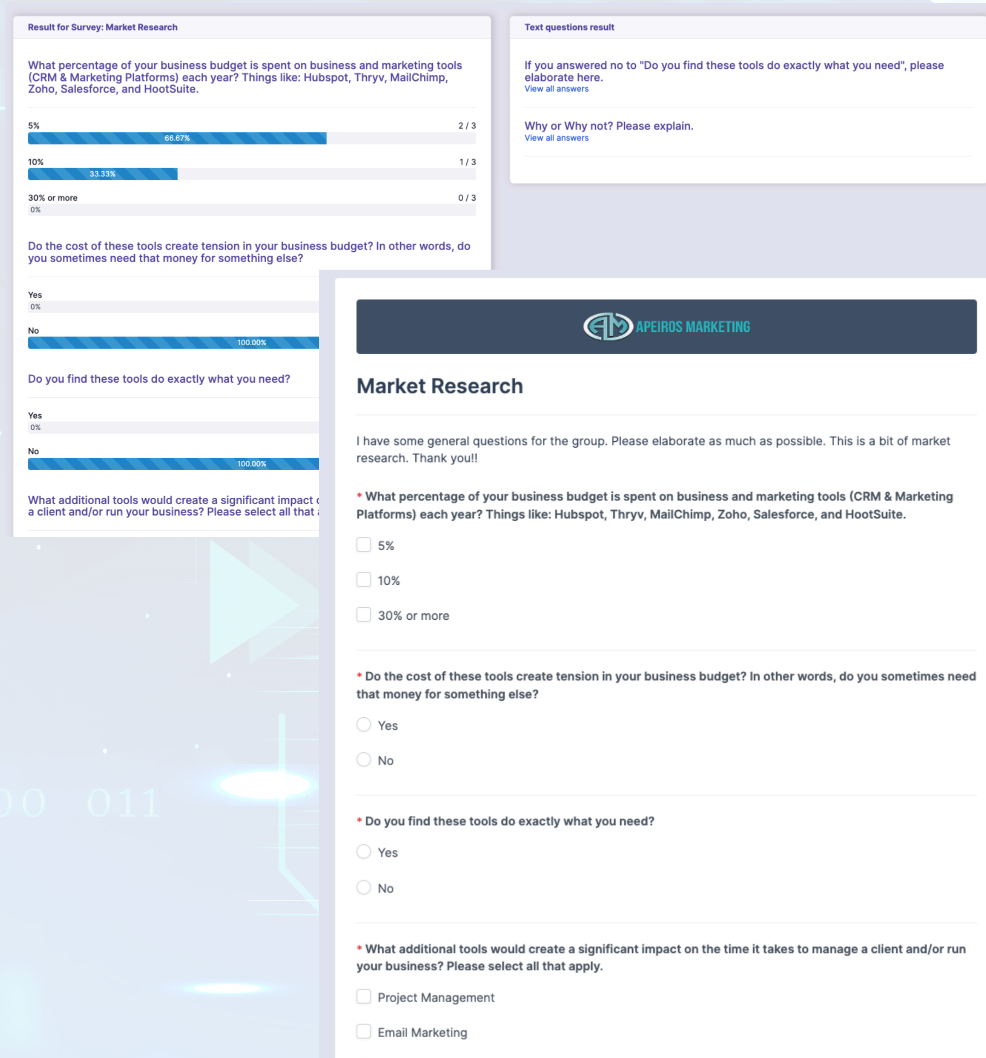
- Generate and send contracts as PDFs with professional templates.
- Automate client reminders for contract renewals or expirations.
- Track contract statuses and follow up effortlessly.
- Store and organize all contracts in one centralized location.
- Collect Digital Signatures

Surveys & Survey Reports

Gather actionable insights with surveys tailored to your audience. Use powerful reporting tools to analyze responses and drive informed decisions.

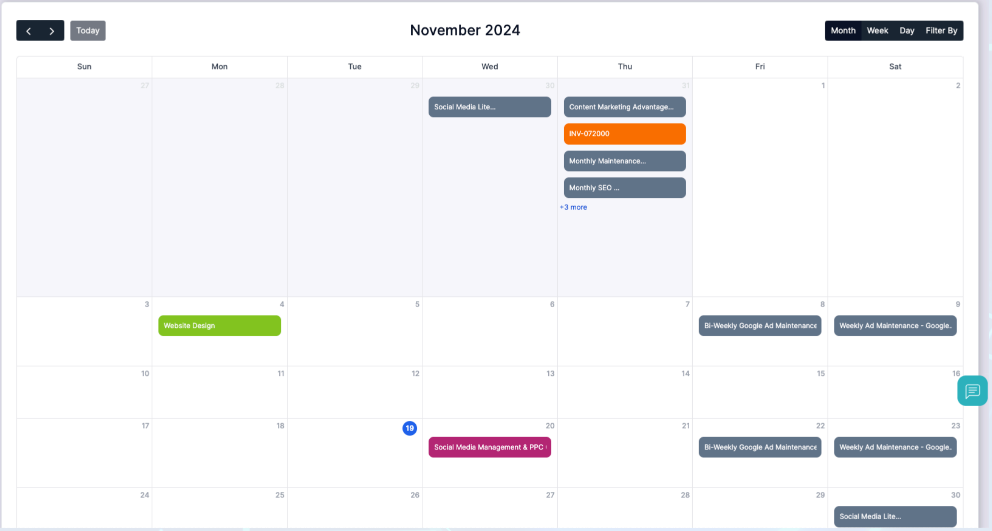
Features:

- Create customizable surveys for clients, leads, or staff.
- Distribute surveys to targeted groups through email or the client portal.
- Analyze survey data with detailed reports for actionable insights.
- Use results to improve customer satisfaction and refine processes.



Calendar

Stay on top of your schedule with an integrated calendar. Track important deadlines and events across your business.



Features:

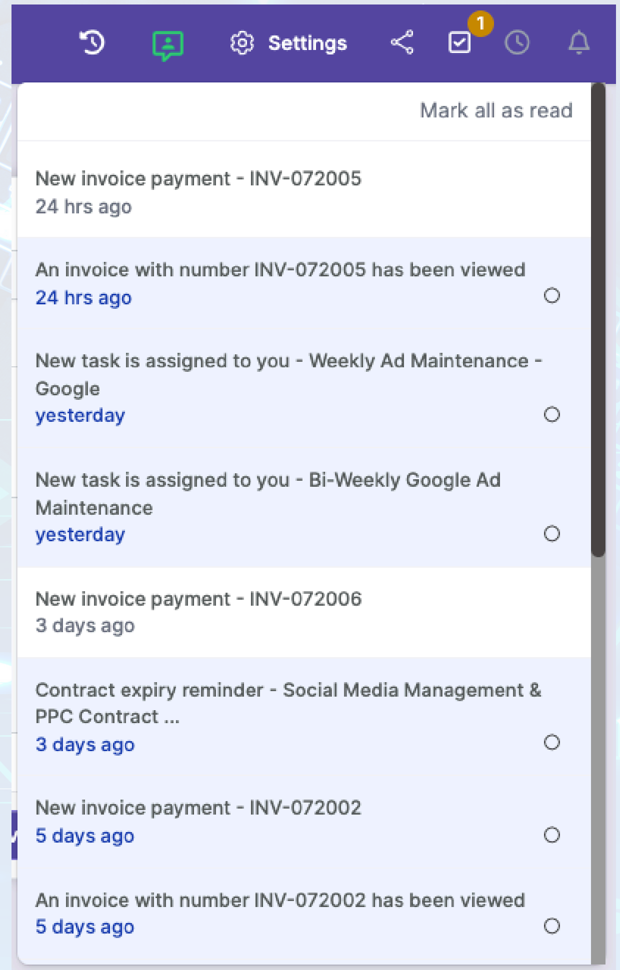
- Monitor invoice due dates, contract expirations, and project deadlines.
- View company-wide events and schedule important meetings.
- Set reminders for critical tasks and activities.
- Integrate calendar events with project workflows for better planning.

Company Newsfeed

Improve internal communication with a shared company newsfeed. Keep everyone updated with announcements and document sharing.

Features:

- Share company events, updates, and internal announcements.
- Upload documents and allow team collaboration.
- Enhance employee engagement and alignment.
- Create a central hub for company-wide communication.

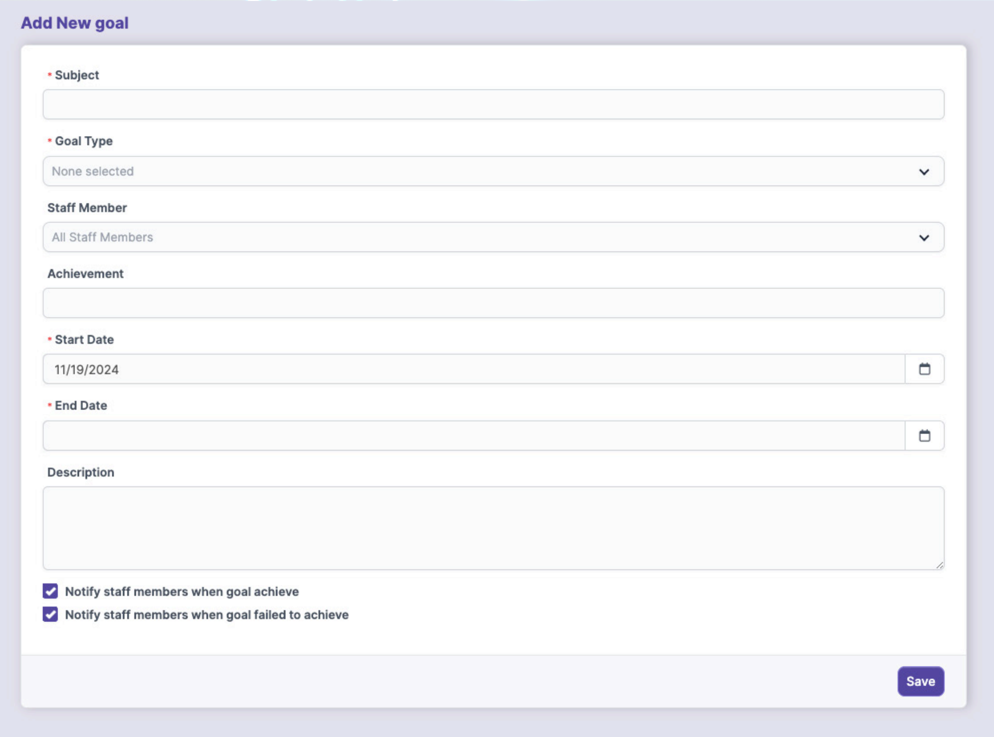


Goals & Tracking

Track and achieve your business objectives with goal-setting tools. Motivate your team and measure success effectively.

Features:

- Set and monitor company-wide or department-specific goals.
- Notify staff about progress toward key objectives.
- Visualize goal achievements with performance metrics.
- Align team efforts with strategic business priorities.

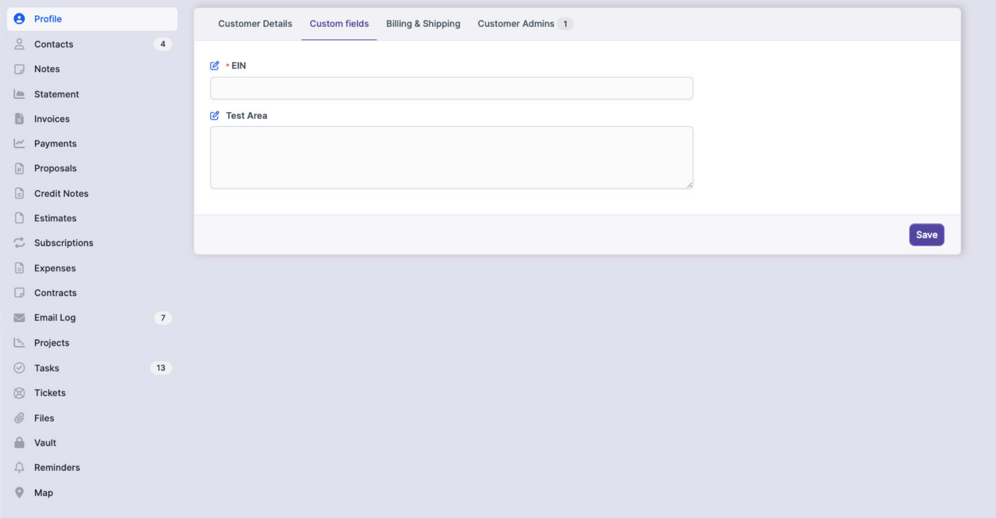


Custom Fields

Tailor the system to your specific business needs with customizable fields. Make every part of the platform work for you.

Features:

- Add custom fields to invoices, estimates, tasks, and projects.
- Configure fields to collect and display the information you need.
- Customize workflows to align with unique business requirements.
- Ensure flexibility and scalability for evolving needs.



Reports

Make informed decisions with detailed reports. Analyze data across projects, clients, and finances to optimize your operations.

Features:

- Generate sales, expense, and income reports with customizable date ranges.
- Monitor lead conversion rates and pipeline performance.
- Access itemized and client-specific financial data.
- Use insights to improve processes and maximize profitability.