



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 customizable by industry, 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.

The screenshot displays the 'Profile' page for a customer named 'Allen's Land Services LLC'. The interface includes a sidebar with navigation options such as Contacts, Notes, Statement, Invoices, Payments, Proposals, Credit Notes, Estimates, Subscriptions, Expenses, Contracts, Email Log, Projects, Tasks, Tickets, Files, Vault, Reminders, and Map. The main content area shows fields for Company name, Phone (904-454-0437), Website (https://www.facebook.com/profile.php?id=100089611606539), Groups (None selected), Currency (System Default), Address (5765 Indian Trail), City (Keystone Heights), State (FL), and Zip Code.

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

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.

The screenshot displays the TruDriveSync project management interface for a project titled "Land Service Business Start Up Package" under the customer "Allen's Land Services LLC". The interface includes a navigation menu with options like Overview, Tasks, Timesheets, Milestones, Files, Discussions, Gantt, Tickets, Contracts, Sales, Notes, and Activity. A sidebar on the left shows a task list with details for "Design Work", "Business Logo Redesign", and "Business Cards". The main area features a project progress bar at 0.00%, a summary table for expenses (Total, Billable, Billed, and Unbilled), and a Gantt chart for logging hours. A yellow warning banner indicates the project is overdue by 193 days.

Category	Value
2 / 2 Open Tasks	0%
0 / 7 Days Left	0%
Total Expenses	\$0.00
Billable Expenses	\$0.00
Billed Expenses	\$0.00
Unbilled Expenses	\$0.00

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.

The screenshot displays the 'Invoices' dashboard with a summary of financial status: Paid Invoices (\$84,287.85), Past Due Invoices (\$1,890.00), and Outstanding Invoices (\$1,980.00). Below this is a 'Create New Invoice' form with the following sections:

- Customer:** Select and begin typing.
- Tags:** Tag
- Allowed payment modes for this invoice:** Stripe ACH, Stripe Checkout
- Bill To / Ship to:** Fields for name, address, and phone.
- Invoice Number:** INV- 072007
- Invoice Date / Due Date:** 11/19/2024 / 12/19/2024
- Prevent sending overdue reminders for this invoice:**
- Currency:** USD \$
- Sale Agent:** Angela Batterson
- Recurring Invoice?:** No
- Discount Type:** No discount
- Admin Note:** Text area for additional information.
- Item Table:**

Item	Description	Qty	Rate	Tax	Amount
	Long description	1	Rate	12.50%	
- Save & Send:** Save & Send, Save and Send Later, Save & Record Payment, Save as Draft, Save

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.

Create New Estimate

Customer
Select and begin typing

Tags
Tag

Bill To **Ship to**

USD \$ **Status**
Draft

Reference #

Estimate Number
EST- 061341

Sale Agent **Discount Type**
Angela Batterson No discount

Estimate Date **Expiry Date**
11/19/2024 11/26/2024

Admin Note

Add Item

Show quantity as: Qty Hours Qty/Hours

Item	Description	Qty	Rate	Tax	Amount
	Description	1	Rate	12.50%	

Sub Total: Save & Send Save and Send Later Save

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.

New Proposal

Subject:

Status: Draft | Assigned: Angela Batterson

To:

Address:

City: State:

Country: None selected | Zip Code:

Email: Phone:

Date: 11/19/2024 | Open Till: 01/18/2025

Currency: USD \$ | Discount Type: No discount

Tags:

Allow Comments:

Add Item: +

Show quantity as: Qty Hours Qty/Hours

Item	Description	Qty	Rate	Tax	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Long description	1	Rate	12.50%	
		Unit			

Include proposal items with merge field anywhere in proposal content as (proposal_items)

Save & Send | Save

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.

Leads

3 Active 97 New Lead 60 1st Contact 1 2nd Contact 4 Working Deal 0 Deal Accepted 0 Lead Finder Contact 9 Customer 7 Lost Leads - 3.38%

+ New Lead Import Leads Filters

25 Export Manipulation Search...

#	Name	Company	Email	Phone	Value	Tags	Assigned	Status	Source	Last Contact	Created
392	WayneCastleberry	Lucas Oil Products	wcastleberry@lucasoil.com	8003422512				New Lead	RocketReach	3 weeks ago	3 weeks ago
391	JaneSanders	W W Gay Mechanical Contractor, Inc.	jsanders0512@yahoo.com	9043882696		Construction - General		New Lead	RocketReach	3 weeks ago	3 weeks ago
390	CafmMaedel	JEA	maedel@jea.com	9046656000		Utilities		New Lead	RocketReach	3 weeks ago	3 weeks ago
388	MelodyTomlinson	Petticoat-Schmitt Civil Contractors, Inc.	mtomlinson@petticoatschmitt.com	9047510888		Construction - General		New Lead	RocketReach	4 weeks ago	4 weeks ago
386	Larry Greer	LG Automotive	lg.automotive@gmail.com	904.2375204	\$3,600.00			Working Deal	Networking	3 weeks ago	2 month ago
385	Christine Lazinsky	Pinnacle Communications Group	christine@pincomgroup.com	(772) 539-2574	\$500,000.00			Lost	Website	6 months ago	6 months ago
384	Luther Beenken	Turnkey Roofing	luther@chooseturnkey.com	904-349-8818	\$500,000.00	business gps		New Lead	Alignable Marketolace	6 months ago	6 months ago

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.

Expenses

2024

Total \$3,050.76

Billable \$0.00

Non Billable \$3,050.76

Not Invoiced \$0.00

Billed \$0.00

+ Record Expense Import Expenses

25 Export Manipulation

Search...

Category	Amount	Name	Receipt
<input type="checkbox"/> Cost of Goods Sold	\$90.00	WPMUDev	
<input type="checkbox"/> Dues & Subscriptions	\$20.00	CHATGPT	
<input type="checkbox"/> Cost of Goods Sold	\$22.16	GoDaddy	MillerHVACJax Domain Purchase.pdf
<input type="checkbox"/> Software/SaaS	\$382.49	Sendible	Sendible - Invoice.pdf
<input type="checkbox"/> Cost of Goods Sold	\$202.27	Gravity Forms	gravityforms.com_my-account/licenses_action=receipt&data=eyJsaWNibnNkX2tleS8iNjY3ZjkyYjM5YjRkZGRROGwOWU2OWU4YjZWFHliwZDVzY3JpcHRpb24iOiU8bmdib0EgQmFodD9yY29uC0gR3Jhd
<input type="checkbox"/> Cost of Goods Sold	\$212.95	Upwork	T657744078.pdf
<input type="checkbox"/> Cost of Goods Sold	\$52.00	CodeCanyon	RCD39324681.pdf
<input type="checkbox"/> Salaries/Contractor Payments	\$1,350.00	Anne Bax	
<input type="checkbox"/> Licenses/Taxes/Business Fees	\$24.87	Bluehost	apeirosprinting-domain-purchase.pdf

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.

The screenshot displays the 'Payments' section of the TruDriveSync interface. At the top, there are navigation tabs for 'Invoice', 'Payments 1', 'Tasks', 'Activity Log', 'Reminders', and 'Notes'. A 'Paid' status indicator is visible in the top left, and a 'Payment' button is in the top right. Below this is a table with the following data:

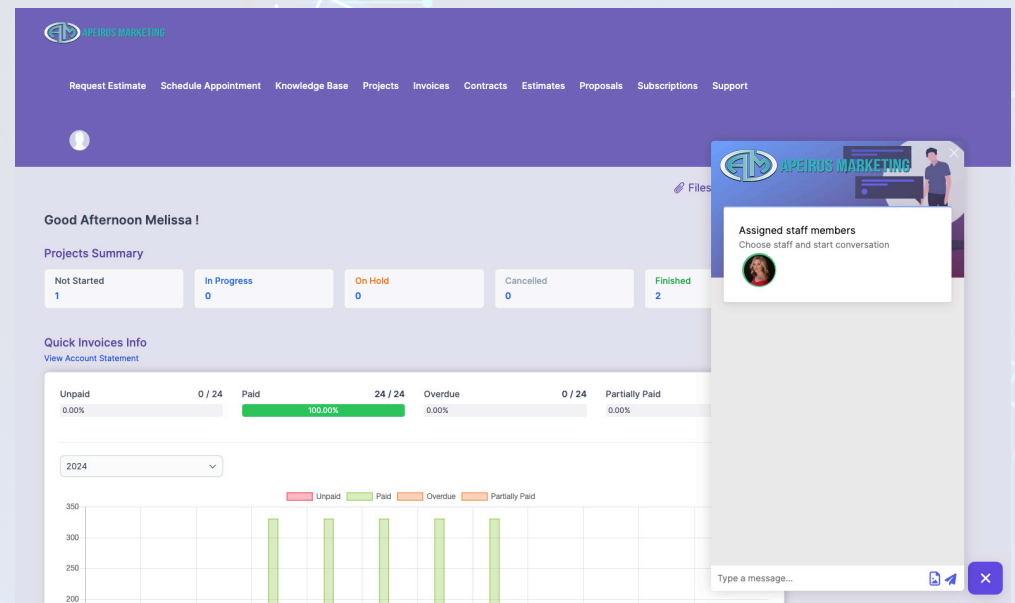
Payment #	Payment Mode	Date	Amount	Options
380	Stripe Checkout Transaction ID: pi_3QMdTvdQvtAyTSki11DfllHm	11/18/2024	\$2,582.10	[Edit] [Delete]

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.

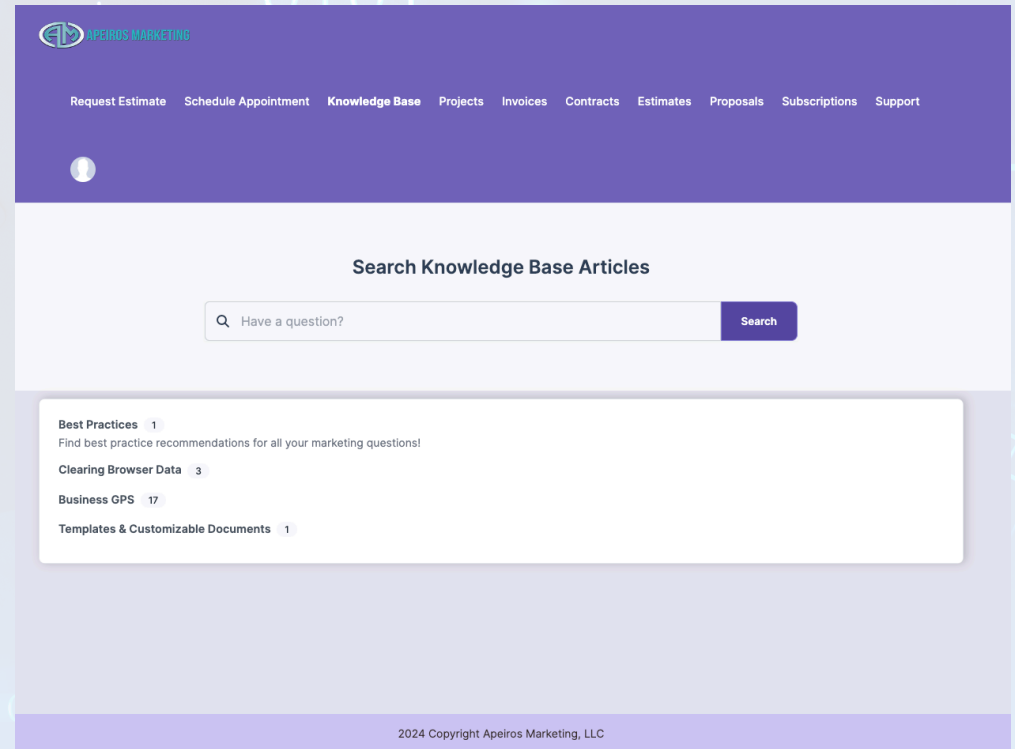


Knowledge Base

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.

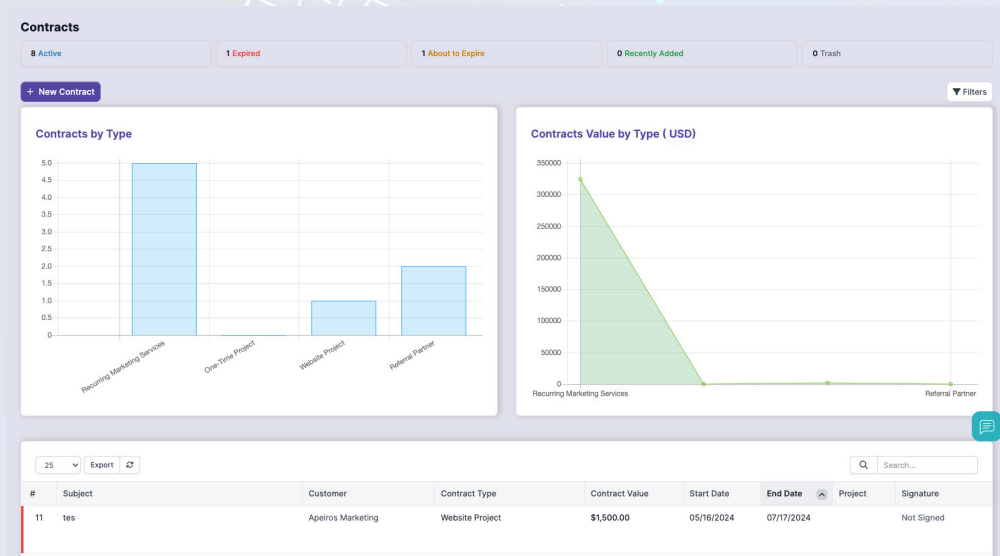


Contract Management

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

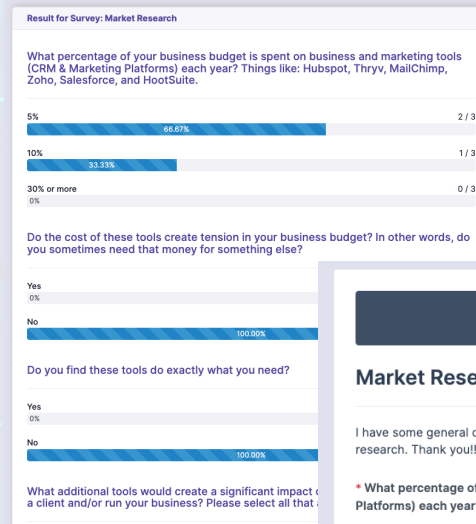


Surveys & Survey Reports

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.



Text questions result

If you answered no to "Do you find these tools do exactly what you need", please elaborate here.

[View all answers](#)

Why or Why not? Please explain.

[View all answers](#)

APEIROS MARKETING

Market Research

I have some general questions for the group. Please elaborate as much as possible. This is a bit of market research. Thank you!!

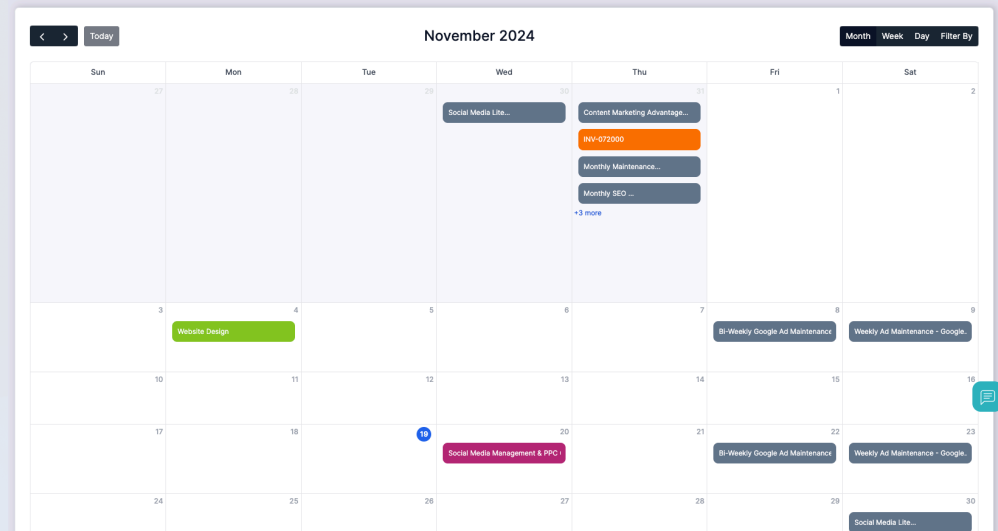
- What percentage of your business budget is spent on business and marketing tools (CRM & Marketing Platforms) each year? Things like: Hubspot, Thryv, MailChimp, Zoho, Salesforce, and HootSuite.
 - 5%
 - 10%
 - 30% or more
- Do the cost of these tools create tension in your business budget? In other words, do you sometimes need that money for something else?
 - Yes
 - No
- Do you find these tools do exactly what you need?
 - Yes
 - No
- What additional tools would create a significant impact on the time it takes to manage a client and/or run your business? Please select all that apply.
 - Project Management
 - Email Marketing
 - ...

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.

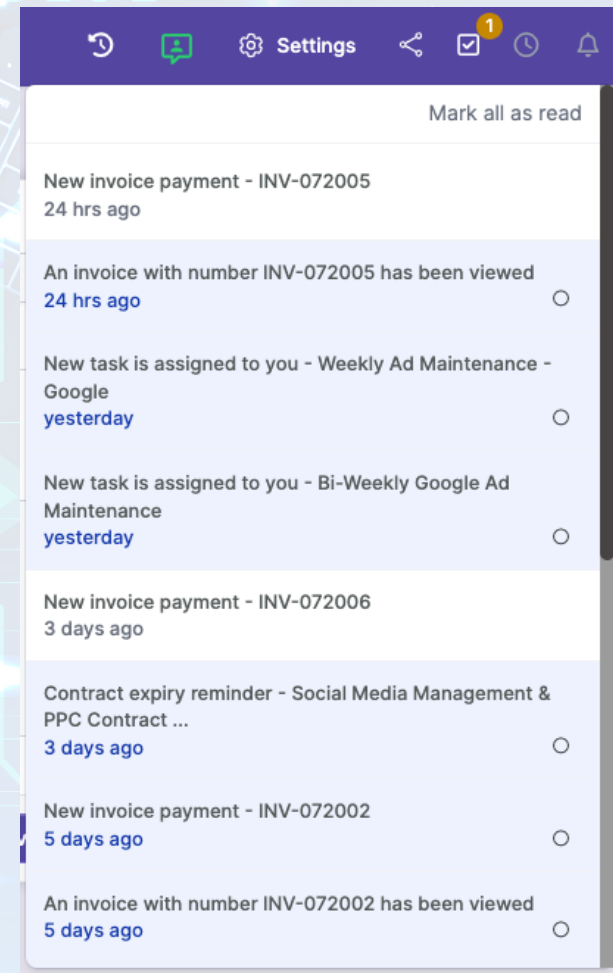


Company Newsfeed

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.

Add New goal

• Subject

• Goal Type

None selected

Staff Member

All Staff Members

Achievement

• Start Date

11/19/2024

• End Date

Description

Notify staff members when goal achieve

Notify staff members when goal failed to achieve

Save

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.

The screenshot shows the 'Custom Fields' configuration page in the TruDriveSync application. On the left is a navigation sidebar with a 'Profile' header and a list of menu items: Contacts (4), Notes, Statement, Invoices, Payments, Proposals, Credit Notes, Estimates, Subscriptions, Expenses, Contracts, Email Log (7), Projects (13), Tasks, Tickets, Files, Vault, Reminders, and Map. The main content area has tabs for 'Customer Details', 'Custom fields', 'Billing & Shipping', and 'Customer Admins (1)'. Under the 'Custom fields' tab, there are two active fields: 'EIN' and 'Test Area', each with a text input field. A 'Save' button is located at the bottom right of the main content area.

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.

The screenshot displays the TruDriveSync Reports interface. On the left is a sidebar menu with options: Sales Report, Invoices Report, Items Report, Payments Received, Credit Notes Report, and Proposals Report. The 'Sales Report' is selected. To the right, a 'Charts Based Report' dropdown menu is open, showing options: Total Income, Payment Modes (Transactions), and Total Value By Customer Groups. Below this, a 'Period' dropdown is set to 'This Month', with other options like 'All Time', 'Last Month', 'This Year', 'Last Year', 'Last 3 months', 'Last 6 months', and 'Last 12 months'. A red warning icon indicates 'Cancelled invoices are excluded from the report'. The main area shows a 'Generated Report' table with columns for Invoice #, Customer, Date, Due Date, Amount, Amount with tax, Total Tax, Print Materials 12.50%, Discount, Adjustment, Applied Credits, Amount open, and Status. The table contains five rows of invoice data, all with a 'Paid' status.

Invoice #	Customer	Date	Due Date	Amount	Amount with tax	Total Tax	Print Materials 12.50%	Discount	Adjustment	Applied Credits	Amount open	Status
INV-072006	Above and Beyond Tree Service	11/16/2024		\$30.00	\$30.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Paid
INV-072004	AQualT Health	11/01/2024	11/18/2024	\$1,350.00	\$1,350.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Paid
INV-072003	Nelson & Company	11/01/2024	11/15/2024	\$395.00	\$395.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Paid
INV-072002	Nelson & Company	11/01/2024	11/15/2024	\$395.00	\$395.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Paid
INV-072001	DB Contutants	11/01/2024		\$2,521.00	\$2,521.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Paid