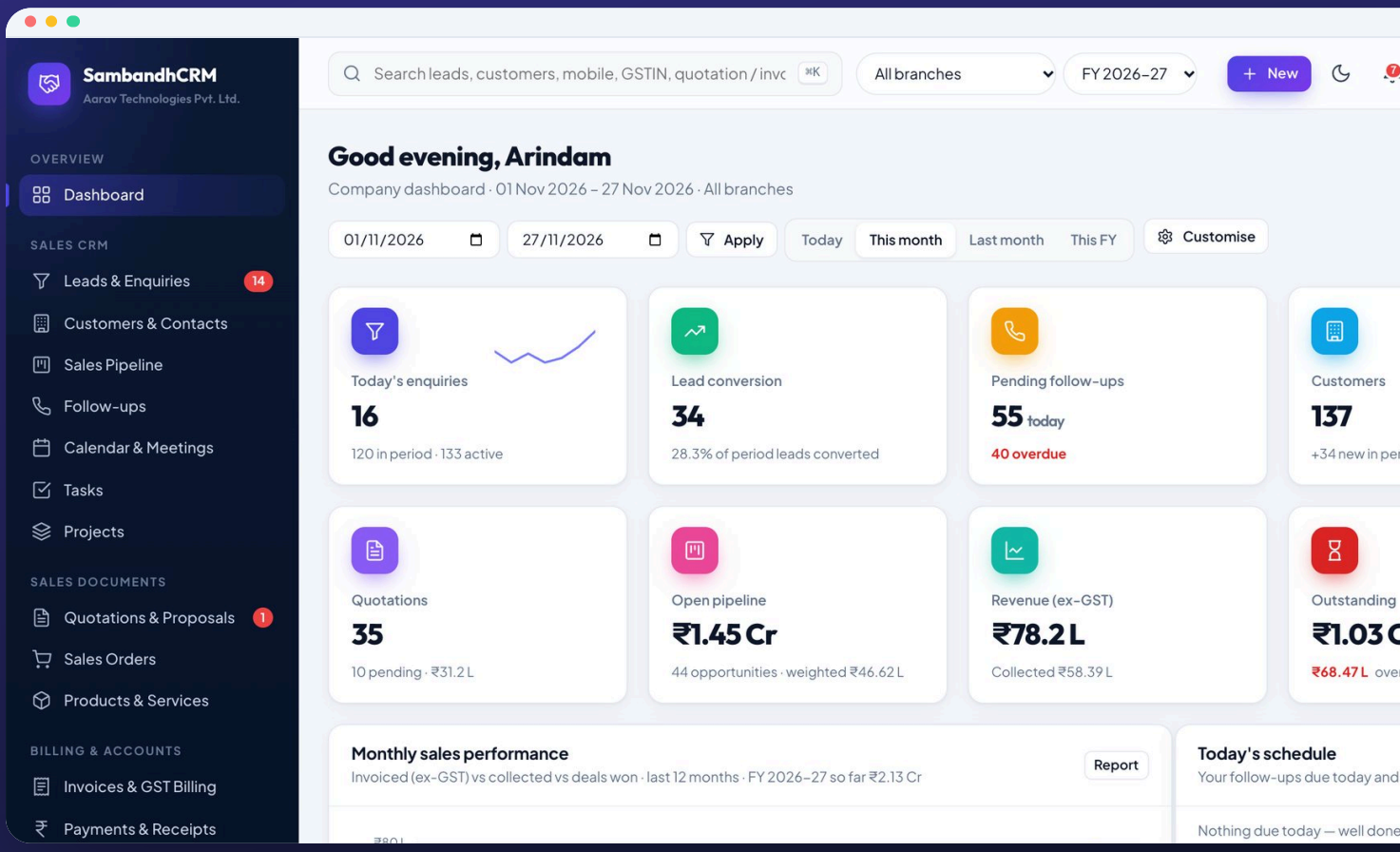
SambandhCRM
BY DIGIQORE INFO SOLUTIONS PRIVATE LIMITED

Every customer. Every rupee. One place.

The complete CRM, billing and service platform built for Indian businesses — leads to GST invoices, WhatsApp to AMC renewals, field sales to customer portal, with AI built in.

GST-ready billing | WhatsApp Business | Field sales app | Customer portal | AI assistant | DPDP compliant



Book a free demo
+91 709 802 7801 · info@digiqore.in · www.digiqore.in

Jalpaiguri, West Bengal

WHY SAMBANDHCRM

One platform to run sales, billing, service and growth

Most businesses juggle a CRM, a billing tool, spreadsheets, WhatsApp and a separate service register. SambandhCRM brings all of it together — so your team works from one source of truth and you see the whole business on one screen.

12	45+	12	31
integrated modules	ready reports	user roles	automation triggers

01 Leads & pipeline
Capture from every channel, auto-assign, score and convert

02 Customer 360°
Contacts, documents, ledger, history and profitability

03 Quotes → orders → invoices
GST billing with CGST/SGST/IGST, e-invoice IRN, UPI QR

04 Payments & accounts
Receipts, ageing, cash & bank book, P&L

05 GST returns
GSTR-1, GSTR-3B and 2B reconciliation with JSON export

06 Support & AMC
Tickets with SLA, knowledge base, renewals & auto-billing

07 Unified inbox
WhatsApp, SMS, email and website chat in one place

08 Marketing & automation
Campaigns with ROI, no-code workflow rules

09 Field sales app
Offline mobile app with GPS visits and collections

10 Customer portal
Self-service invoices, payments, tickets and renewals

11 Purchases & vendors
Requisition to PO to bill to payment, partners & commission

12 AI & analytics
45+ reports, AI assistant, churn and revenue forecasts

Made for India

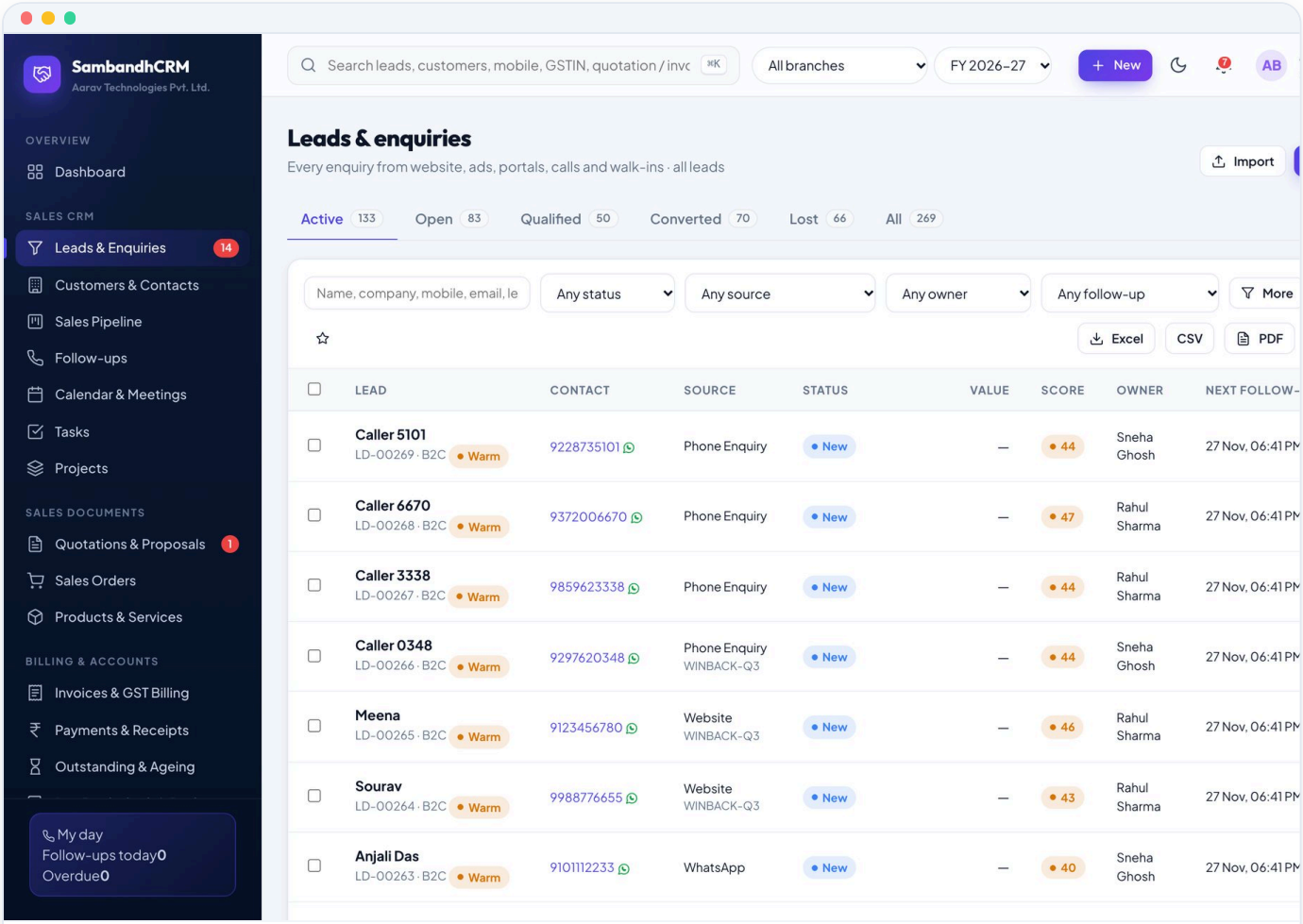
₹ and Indian number format (₹1,25,000 · ₹1.45 Cr) · GSTIN validation & state-wise tax · Financial year Apr–Mar numbering · DD-MM-YYYY & IST · UPI, NEFT, RTGS, cheque modes · TDS, MSME 45-day rule, DPDP Act

01

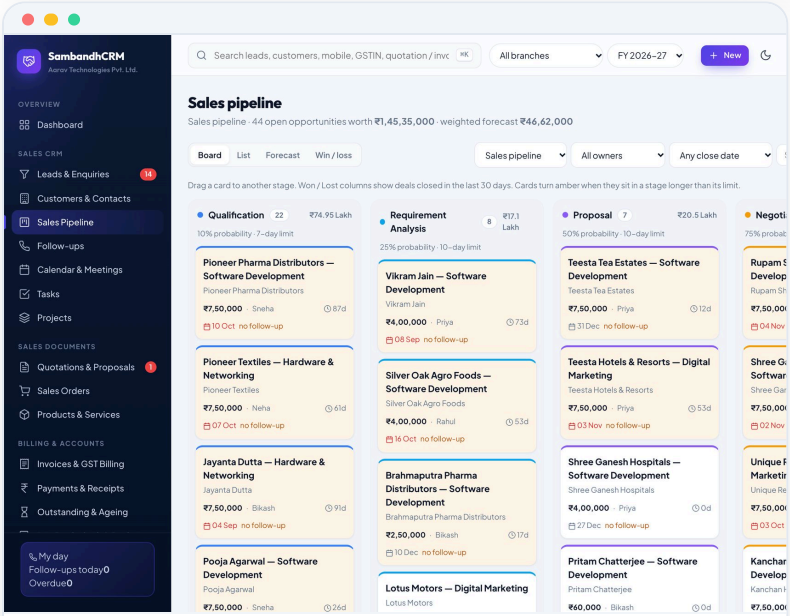
SALES CRM

Leads & sales pipeline

Never lose an enquiry again. Leads arrive automatically from your website, Facebook, Google Ads, IndiaMART, JustDial and WhatsApp — assigned round-robin to the right salesperson within seconds.



Leads list with source, score, owner and next follow-up



Drag-and-drop opportunity pipeline

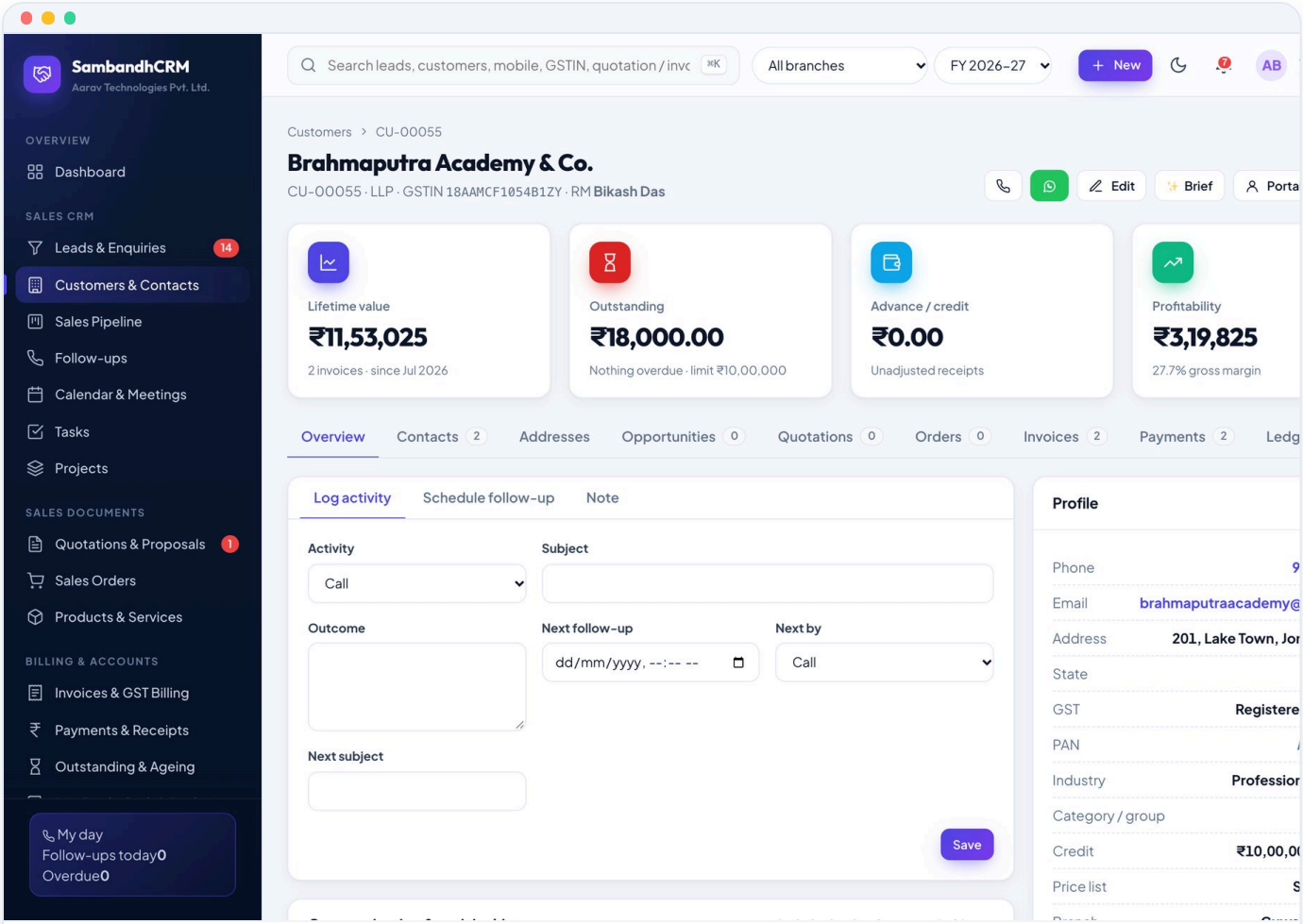
- Lead capture API & web forms with UTM tracking
- Round-robin and branch-wise auto-assignment
- Duplicate detection & merging
- Lead scoring, temperature (hot / warm / cold)
- Multiple pipelines with custom stages & probability
- Weighted forecast and stalled-deal alerts
- Lost-reason analysis and lead recycling
- Excel / CSV import and bulk actions

02

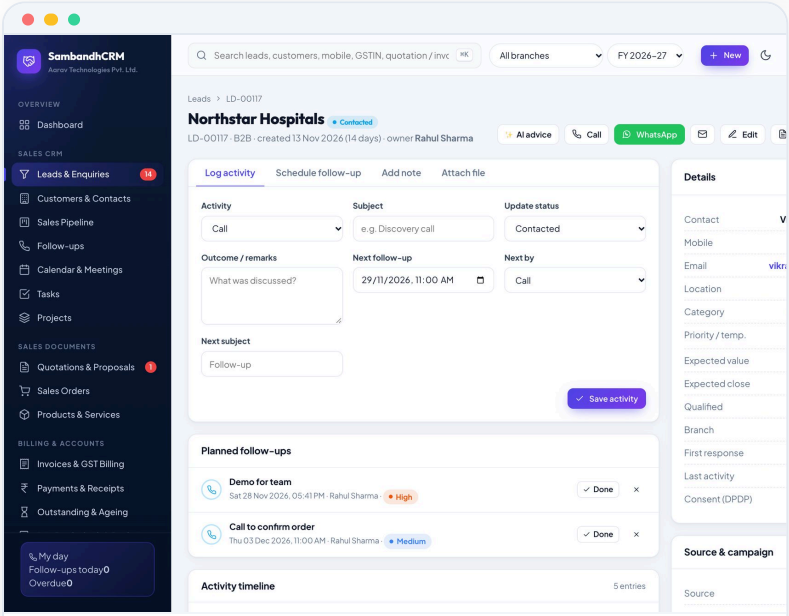
SALES CRM

Lead detail & customer 360°

Everything about a lead or customer on one page — contacts, conversations, quotations, invoices, payments, tickets, documents and a complete timeline of every interaction.



Customer 360°: lifetime value, outstanding, credit and profitability



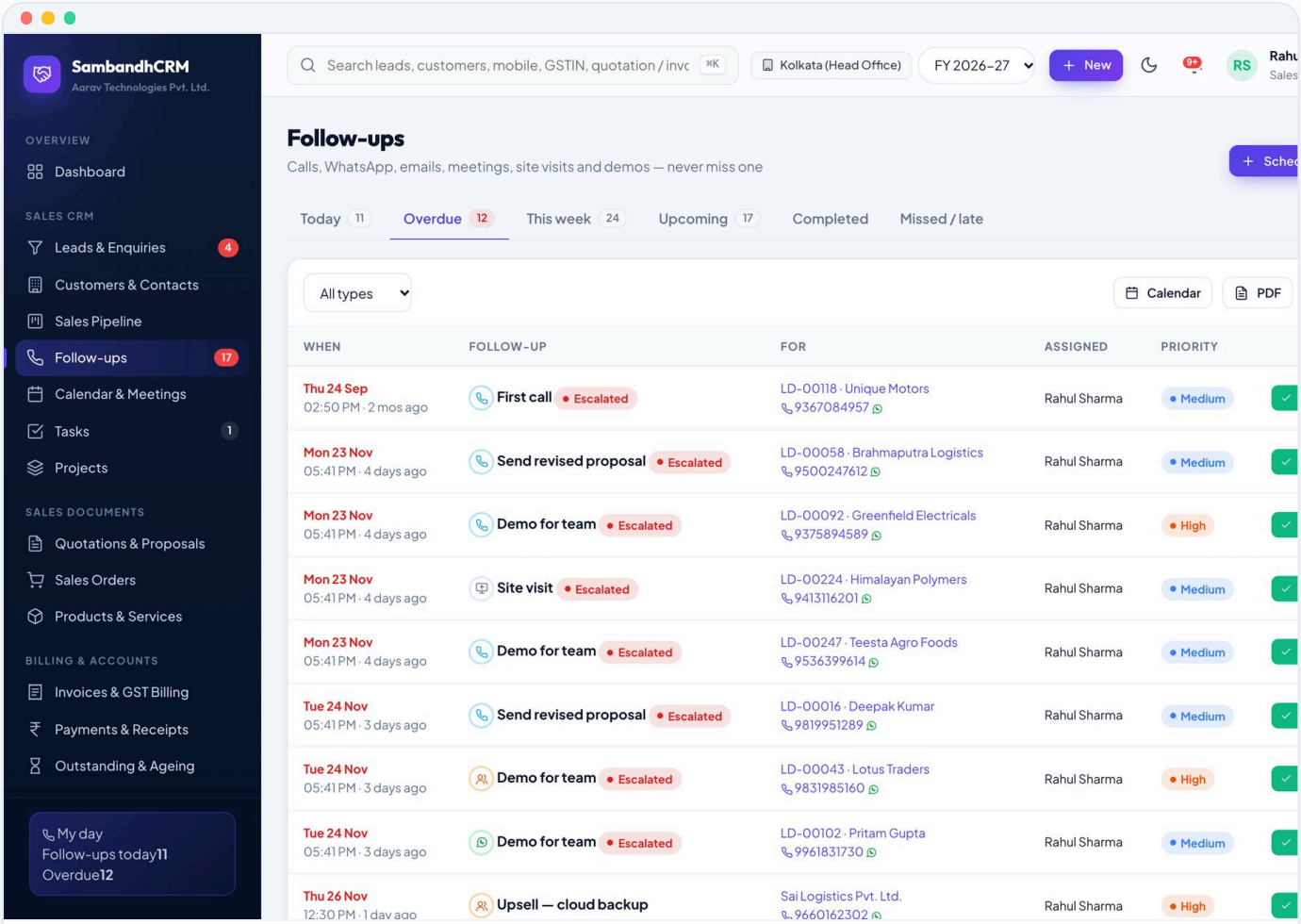
Lead page with activity logging and next follow-up

- Individual and company customers, multiple contacts
- Billing & shipping addresses with GSTIN, PAN, CIN
- Customer ledger and statement of account
- Credit limits with automatic blocking
- Document store with expiry reminders
- Key-account flag, groups, categories, tags
- Birthday & anniversary reminders
- Consent and privacy status per customer

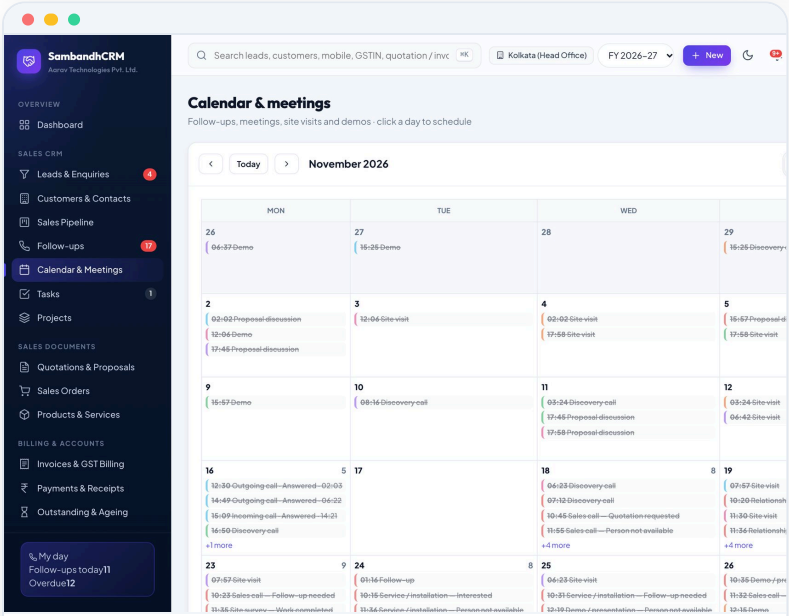
PRODUCTIVITY

03 Follow-ups, calendar & tasks

Follow-ups that never slip. Every call, meeting, demo and site visit is scheduled, reminded 30 minutes before, and escalated to the manager if missed.



Today, overdue and upcoming follow-ups with escalation



Team calendar with month, week and day views

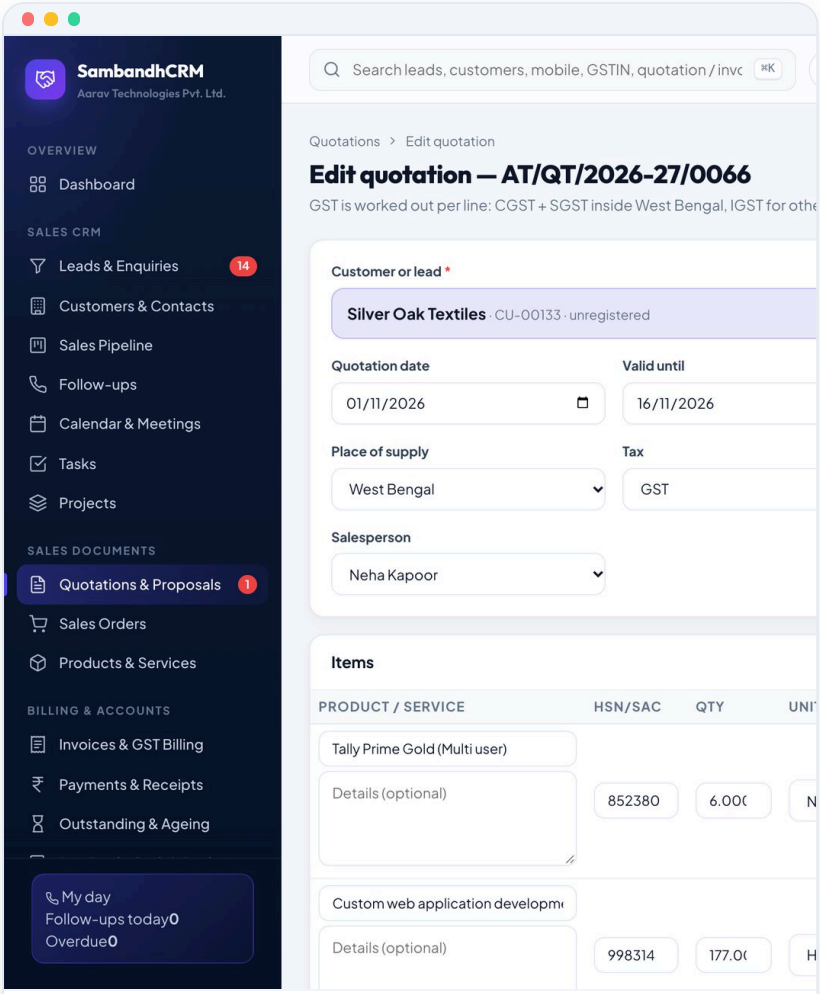
- Call, WhatsApp, email, meeting, demo, site-visit follow-ups
- Reminders and overdue escalation to managers
- Recurring activities
- Google / Outlook calendar sync (ICS feed)
- Meeting invites with video links
- Tasks with sub-tasks, checklists and dependencies
- Projects with milestones and profitability
- Daily work reports and attendance

04

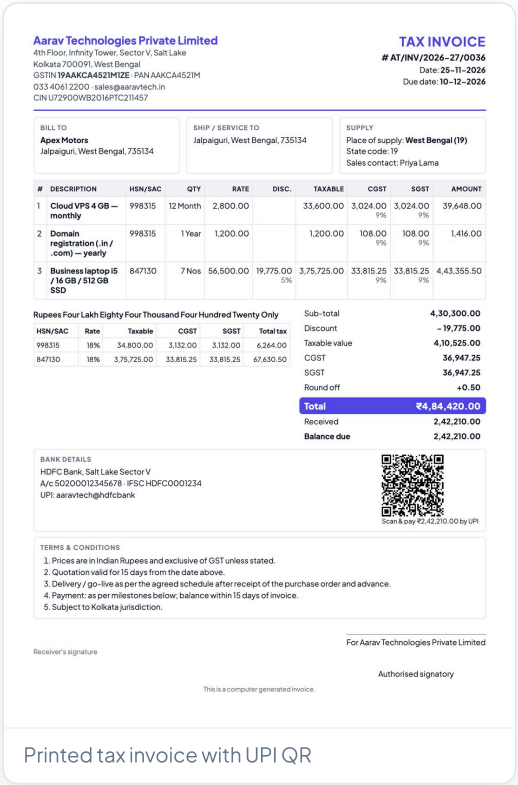
BILLING

Quotations, orders & GST invoicing

Send a professional quotation in minutes, let the customer accept it online, and turn it into an order and a GST invoice without re-typing a single line.



Quotation editor with HSN/SAC, discounts and GST



Printed tax invoice with UPI QR

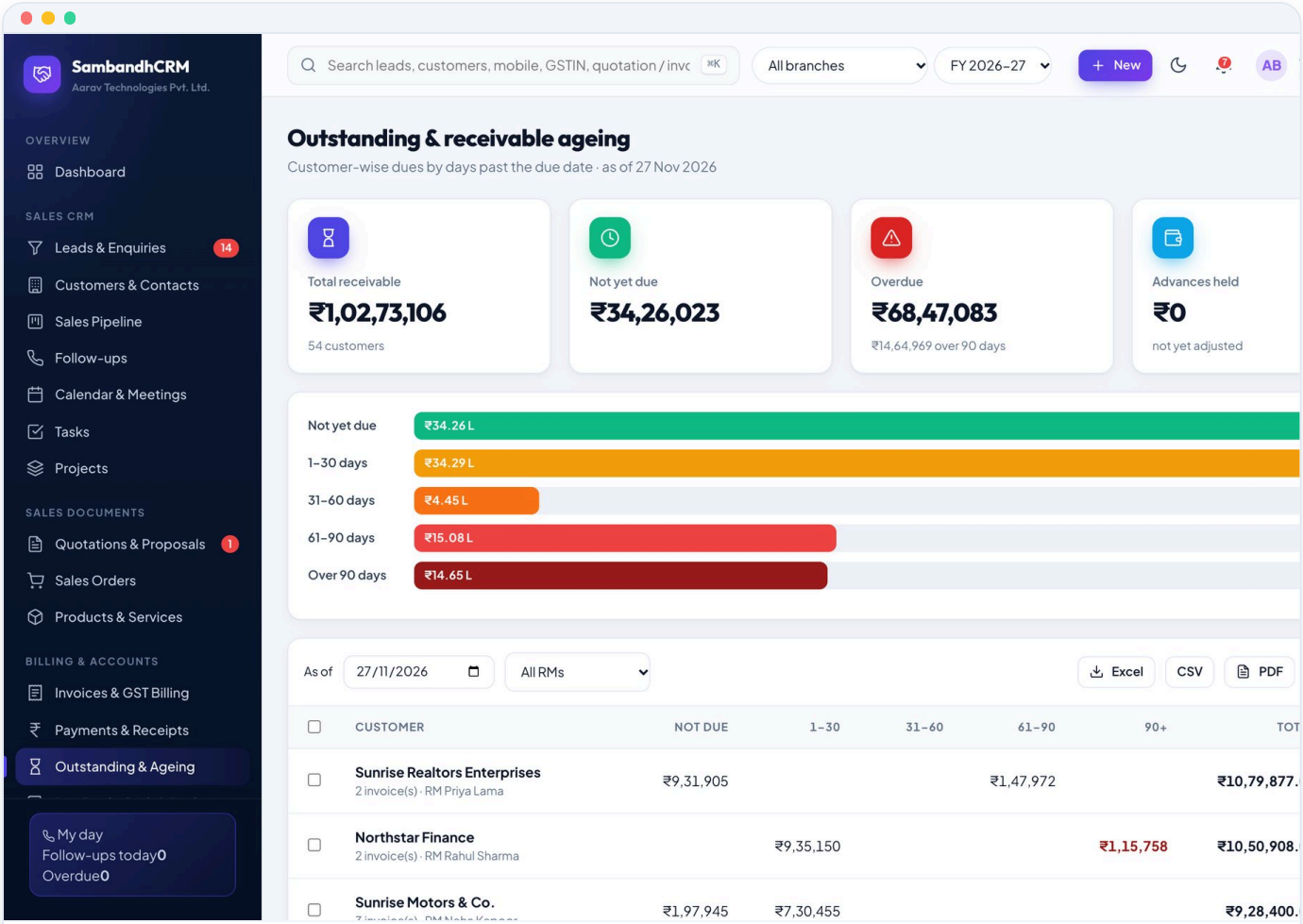
- Quotation → sales order → invoice conversion, no duplicate entry
- CGST / SGST / IGST by place of supply, cess, HSN/SAC summary
- Tax, non-GST, proforma invoices, credit & debit notes, delivery challans
- Discount approval limits by role (maker-checker)
- E-invoice IRN and e-way bill details
- Online quote acceptance, invoice view and UPI QR payment
- Three print templates, A4 and thermal receipts
- Share on WhatsApp and email in one click

05

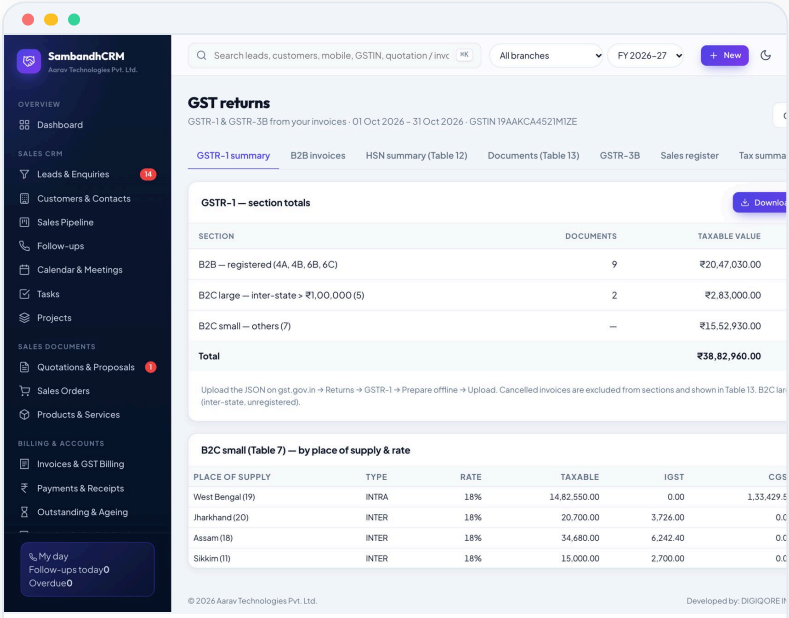
BILLING

Payments, receivables & GST returns

Know exactly who owes you what. Record receipts in any Indian payment mode, track ageing, chase dues automatically, and file GST with confidence.



Receivables ageing: not due, 1–30, 31–60, 61–90 and 90+ days



GSTR-1 summary with JSON download for the GST portal

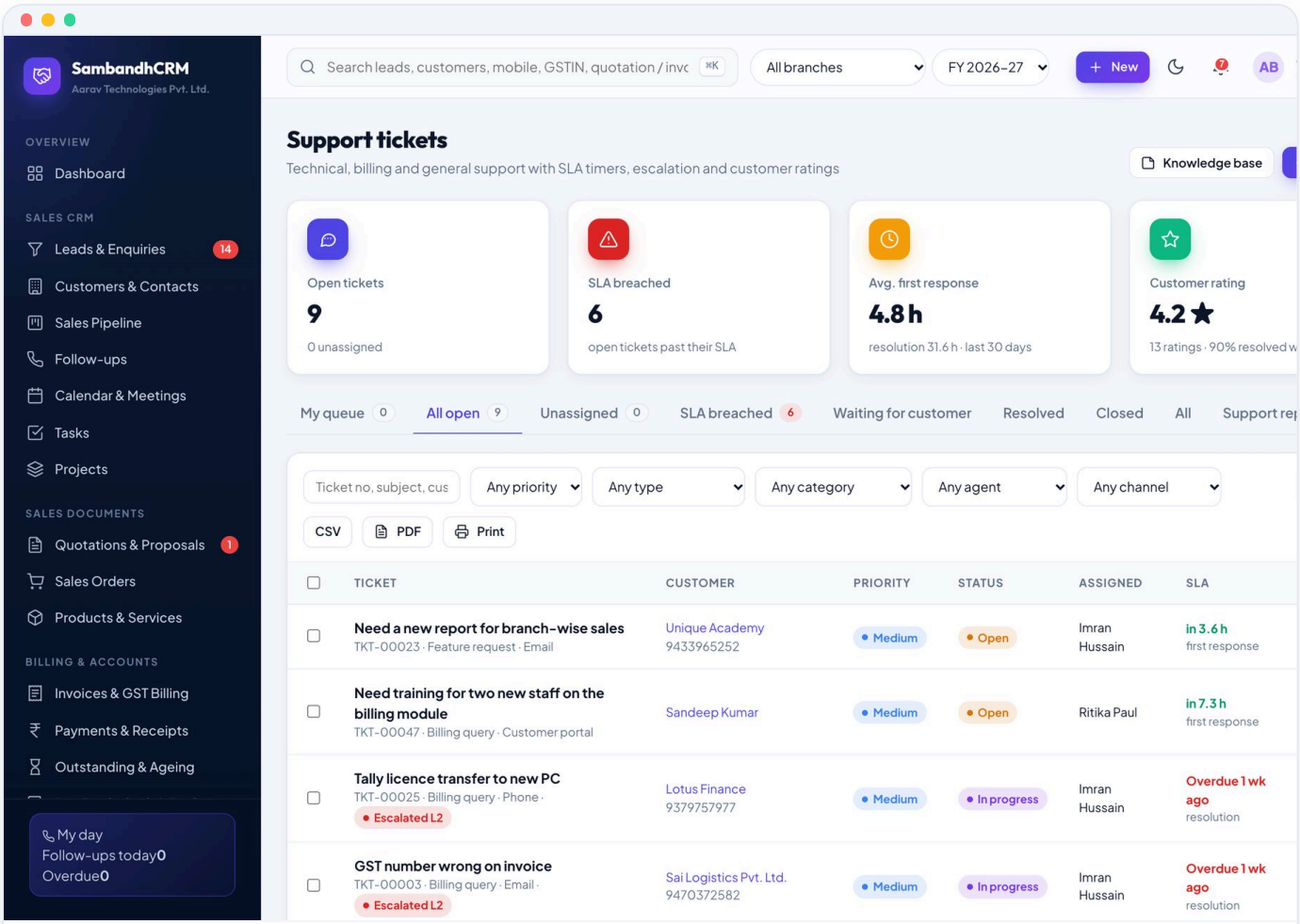
- Receipts by cash, UPI, NEFT, RTGS, IMPS, cheque, card
- Advance, partial and on-account payments, TDS
- Automatic allocation to oldest invoices
- Payment reminders on WhatsApp and email
- Cash book, bank book, income & expenses, P&L
- GSTR-1, GSTR-3B and GSTR-2B reconciliation
- Lock dates for closed periods

06

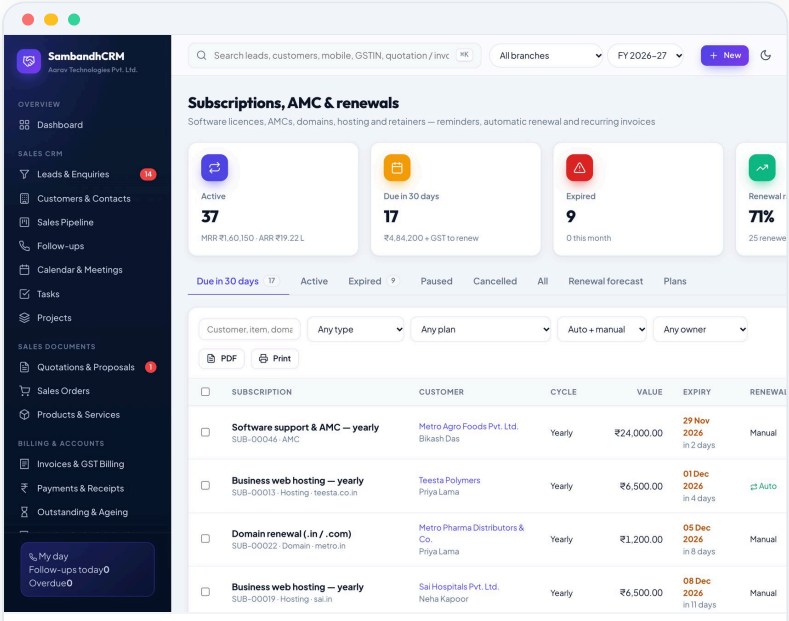
SERVICE

Support tickets & AMC renewals

Deliver service your customers notice. Tickets from WhatsApp, email, portal and phone are auto-classified, assigned, and tracked against SLAs — while subscriptions and AMCs renew themselves.



Ticket desk with SLA, escalation and customer rating



Subscriptions, AMC and renewals with revenue forecast

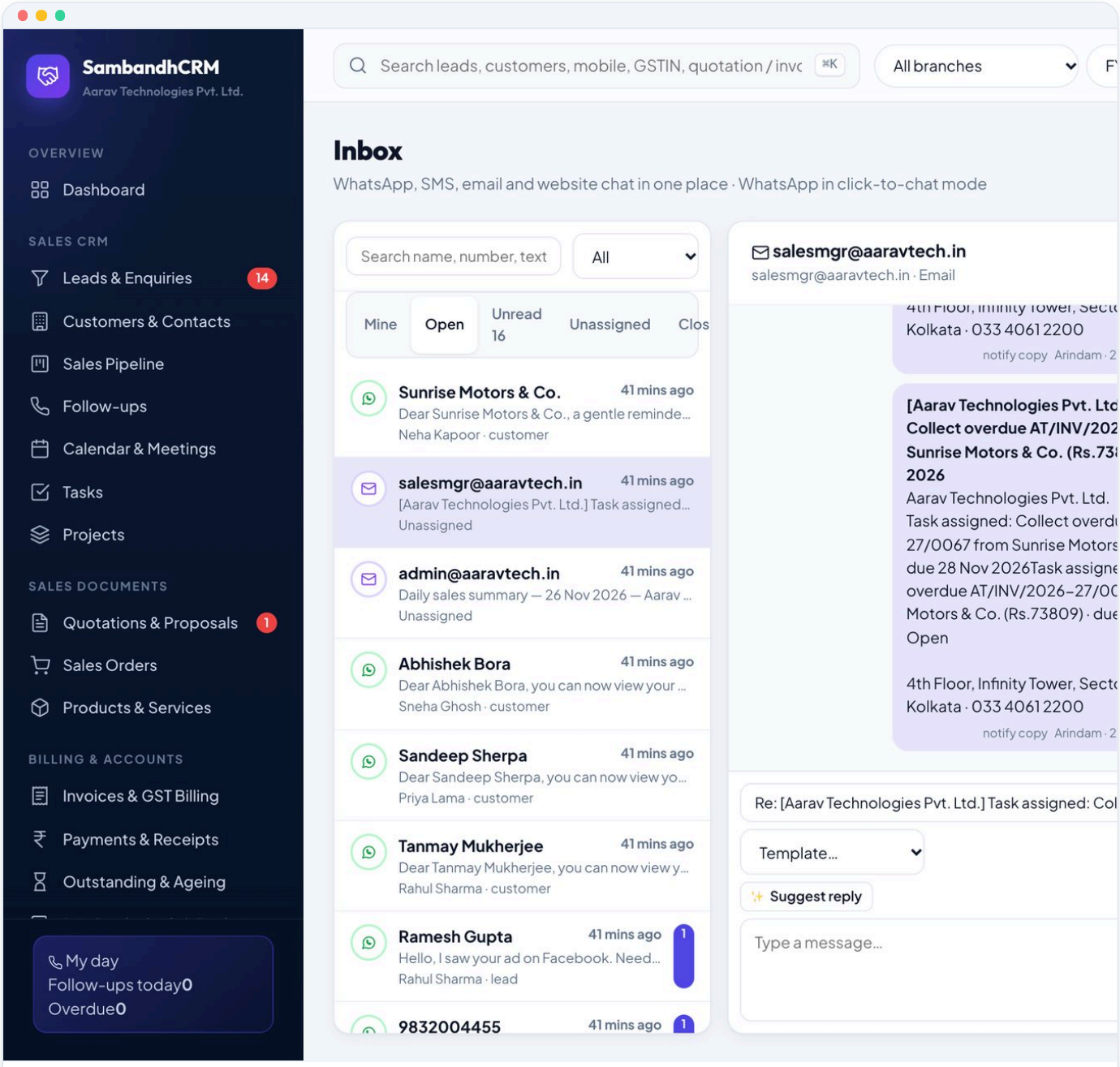
- Ticket SLA with first-response & resolution timers
- Auto-assignment, escalation levels and CSAT rating
- Knowledge base and public help centre
- Subscriptions: monthly to yearly cycles, setup fee
- Renewal reminders, auto-renew and auto-invoicing
- Pause, upgrade, downgrade and cancel with history

07

COMMUNICATION

Unified inbox — WhatsApp, SMS, email & chat

Every customer conversation in one inbox, linked to the right customer or lead. Assign chats, use approved templates, and share quotes and invoices without leaving the CRM.



Inbox with conversation, customer details and assignment

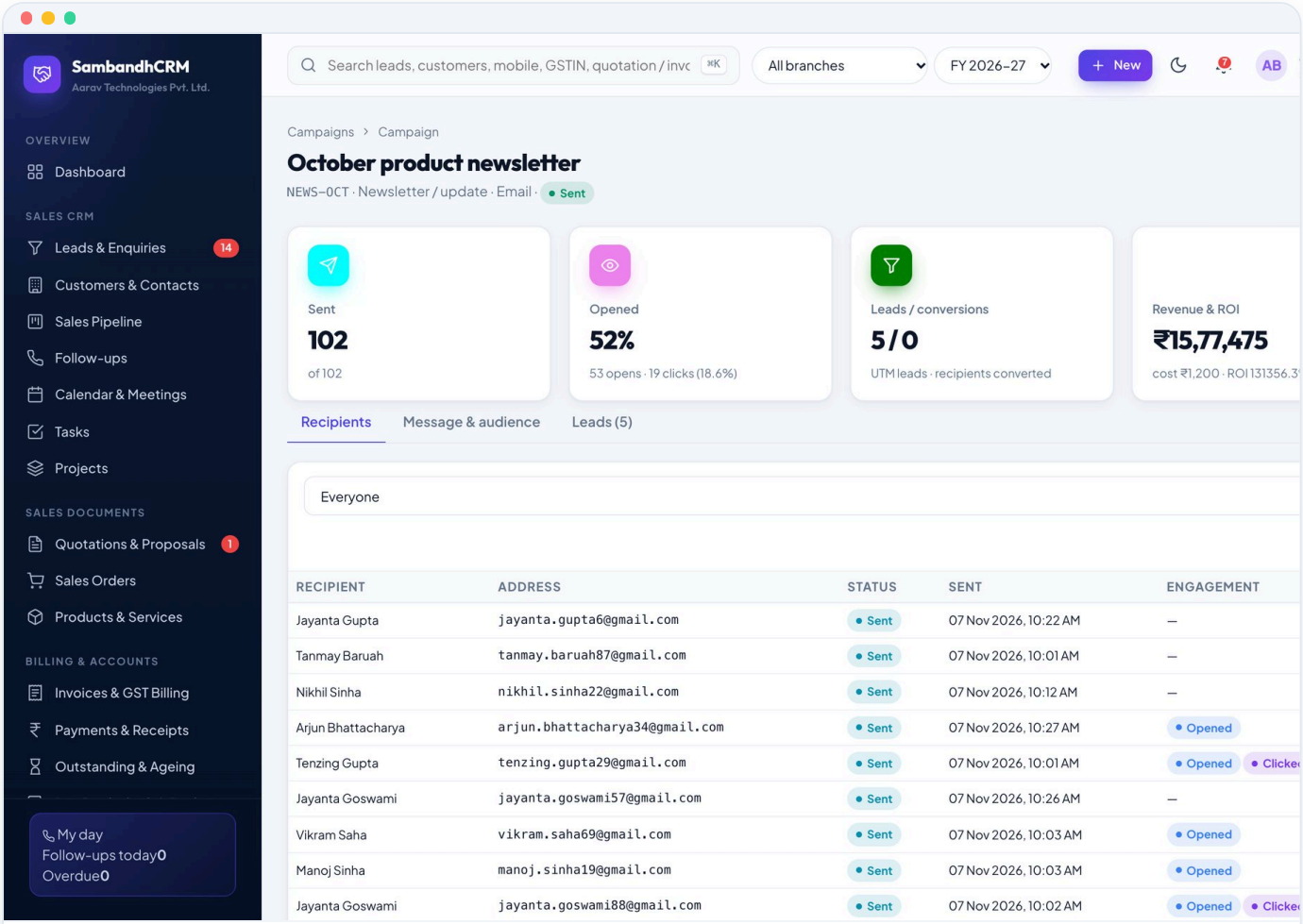
- WhatsApp Business Cloud API with approved templates
- 24-hour window rules and delivery / read ticks
- SMS gateway with DLT template IDs
- Email with SMTP sending and IMAP inbox sync
- Website live-chat widget
- New contacts become leads automatically
- STOP / START opt-out handling
- AI-suggested replies (optional)

08

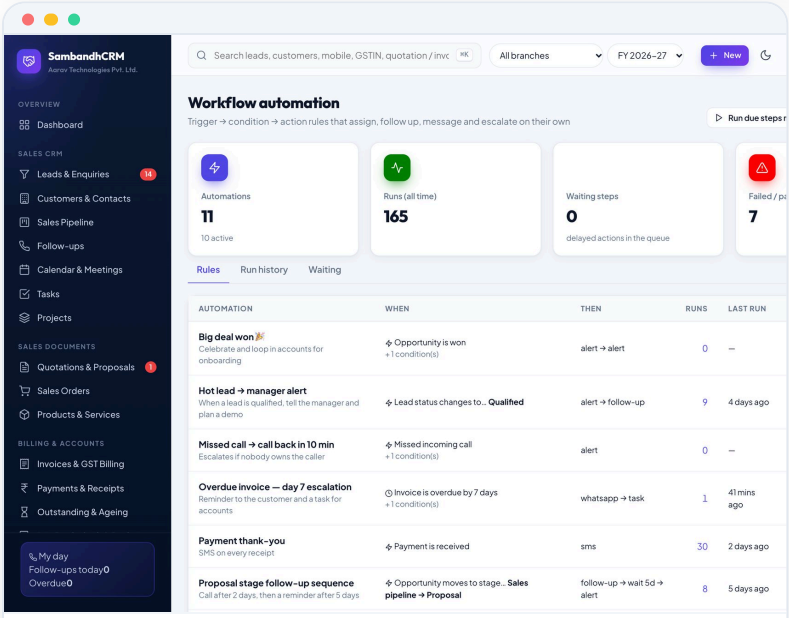
GROWTH

Marketing campaigns & workflow automation

Run campaigns that pay for themselves, and let the CRM do the routine work. Measure opens, clicks, replies, leads and revenue for every rupee spent.



Campaign results: delivery, opens, leads and ROI



No-code automation rules with run history

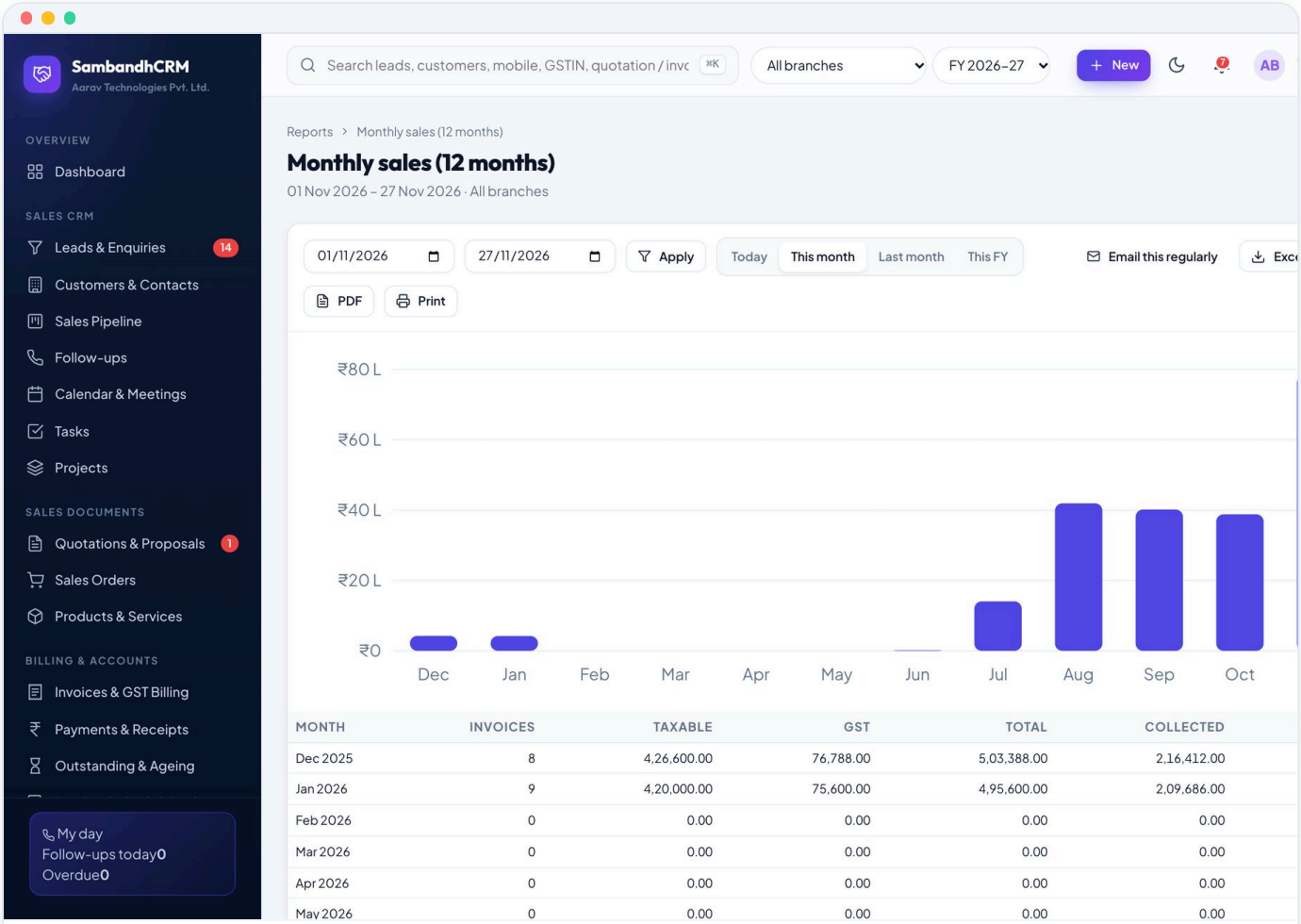
- Email, SMS and WhatsApp campaigns to smart segments
- Birthday, anniversary and festival greetings on autopilot
- Open, click, reply and unsubscribe tracking
- Campaign ROI from leads and invoices
- 31 triggers: new lead, deal won, invoice overdue, ticket breached…
- Actions: assign, message, follow-up, task, update, wait, webhook

09

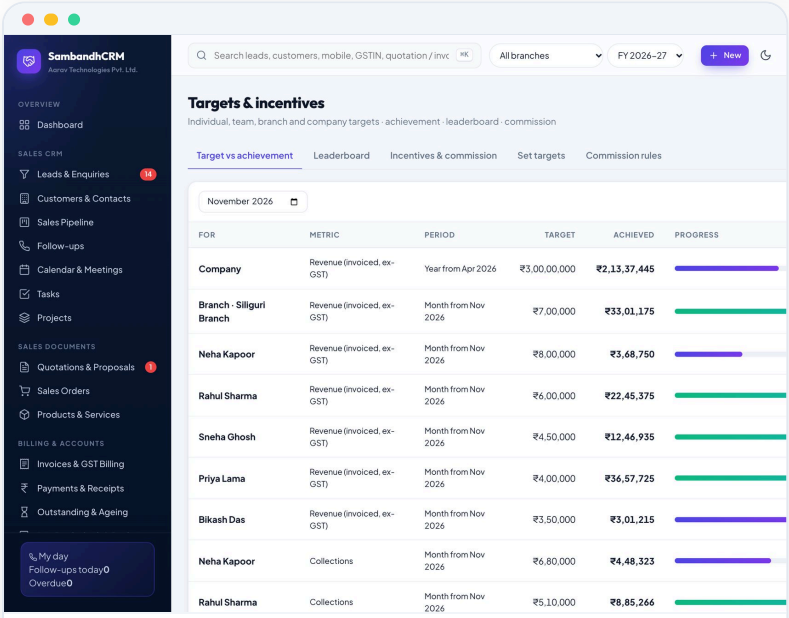
INSIGHTS

Reports, dashboards & targets

Decisions backed by numbers. Role-aware dashboards, 45+ ready reports with Excel / PDF export, a custom report builder, and targets with live achievement and incentives.



Monthly sales report with chart and export



Targets vs achievement for people, teams and branches

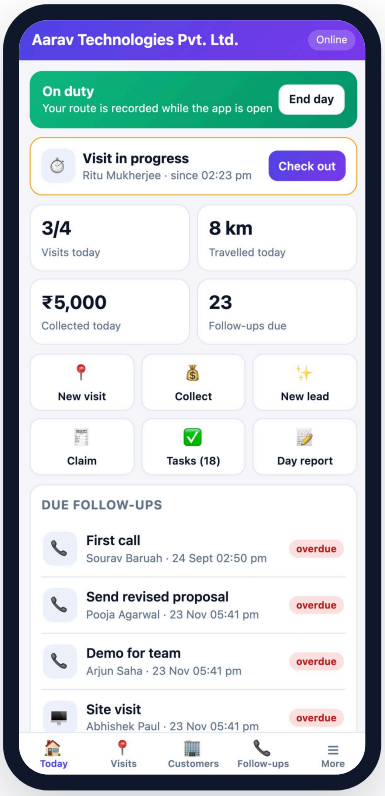
- Sales, lead, financial, customer and service reports
- Custom report builder — group, filter, chart
- Scheduled reports emailed daily, weekly or monthly
- Targets for revenue, collection, deals, activities
- Commission rules and incentive approvals
- Leaderboard and productivity tracking

10

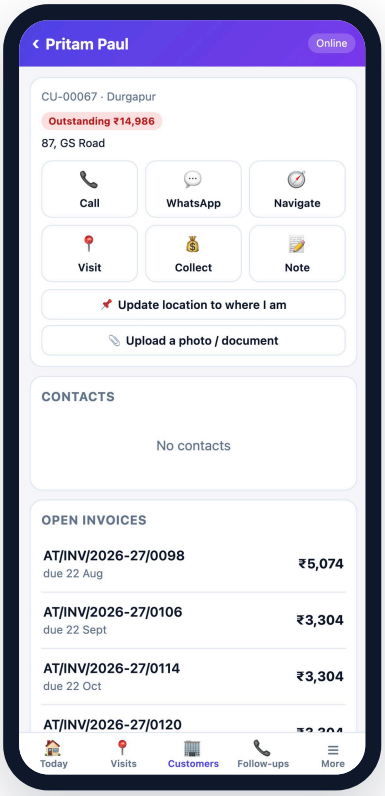
FIELD SALES

Mobile app for your field team — works offline

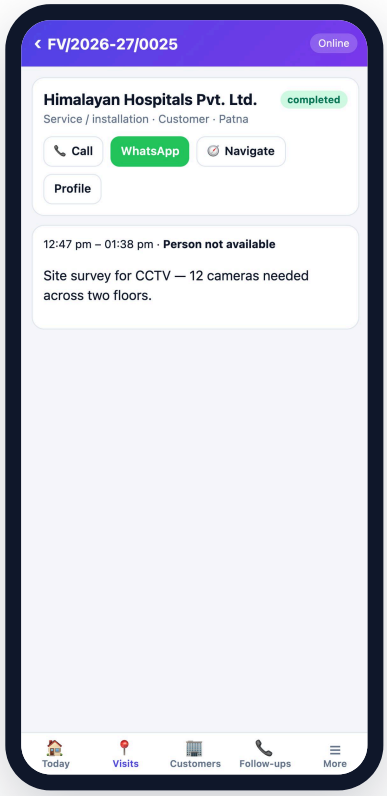
An installable app for Android and iPhone. Your team plans visits, checks in with GPS, records outcomes, photos and customer signatures, and collects payments — even without network. Everything syncs when they are back online.



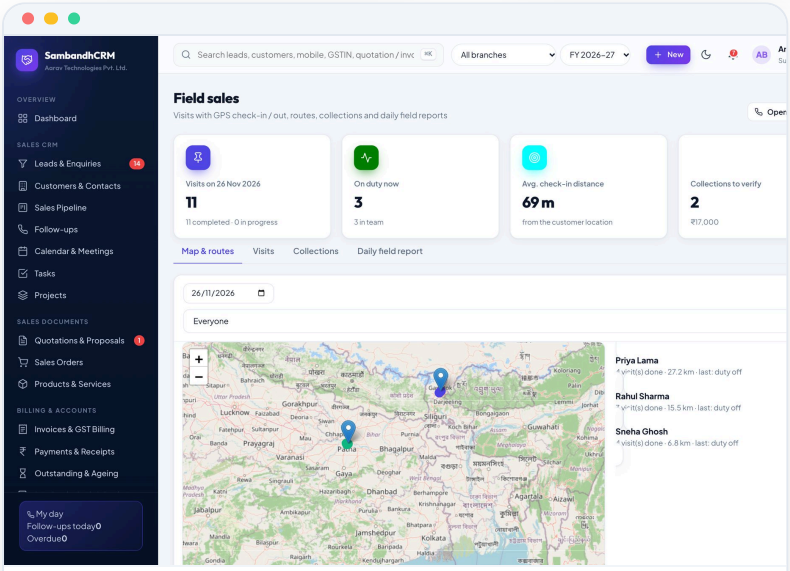
Today: duty, visits, collections



Customer: call, WhatsApp, navigate



Visit check-in & outcome



Manager view: live map, routes and visits

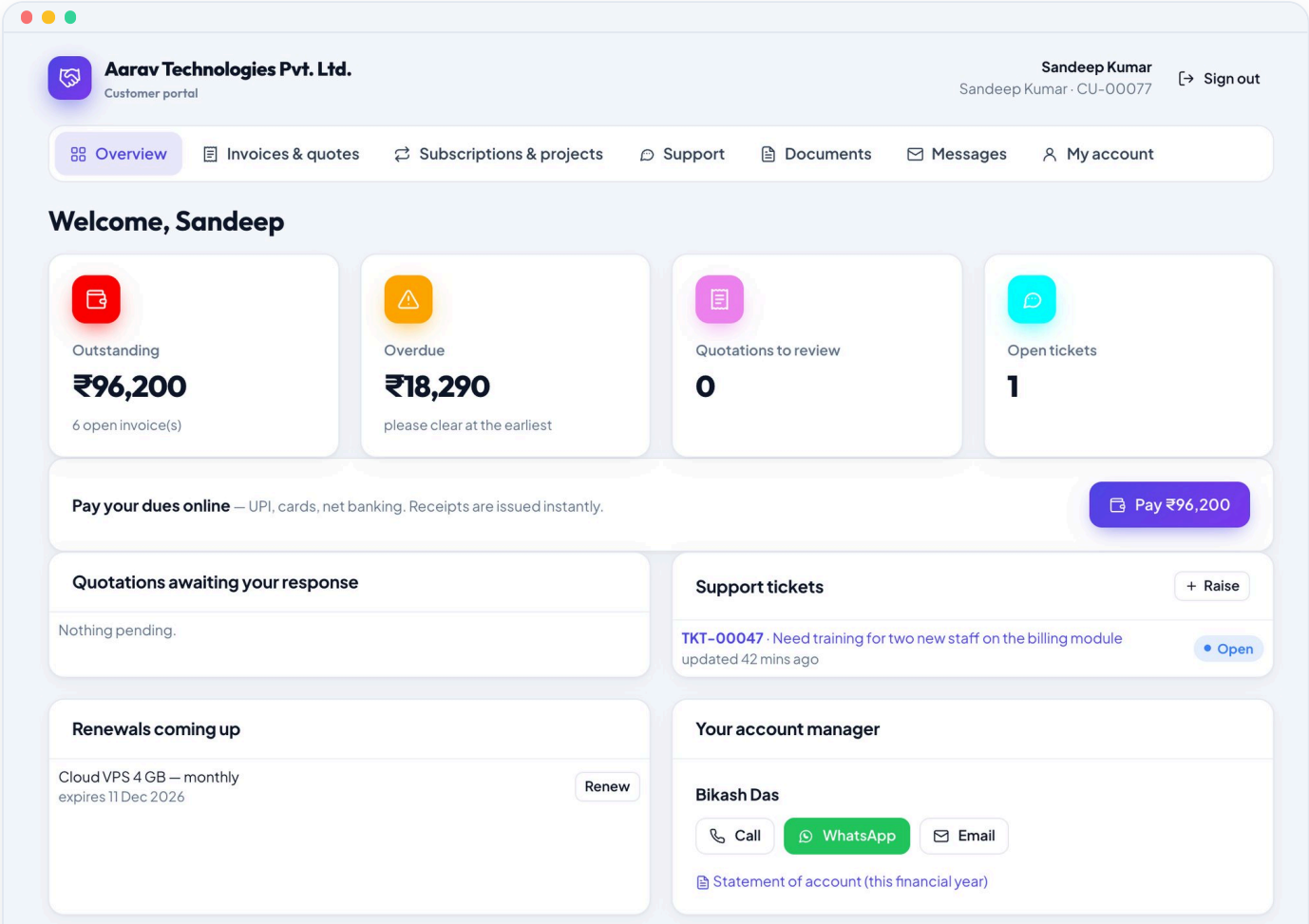
- GPS check-in / check-out with distance from customer
- Photos, remarks and customer signature
- Field payment collection with accounts verification
- Travel & expense claims with km × rate
- Route and distance travelled per day
- Daily field report and team map for managers
- Offline mode with automatic sync

11

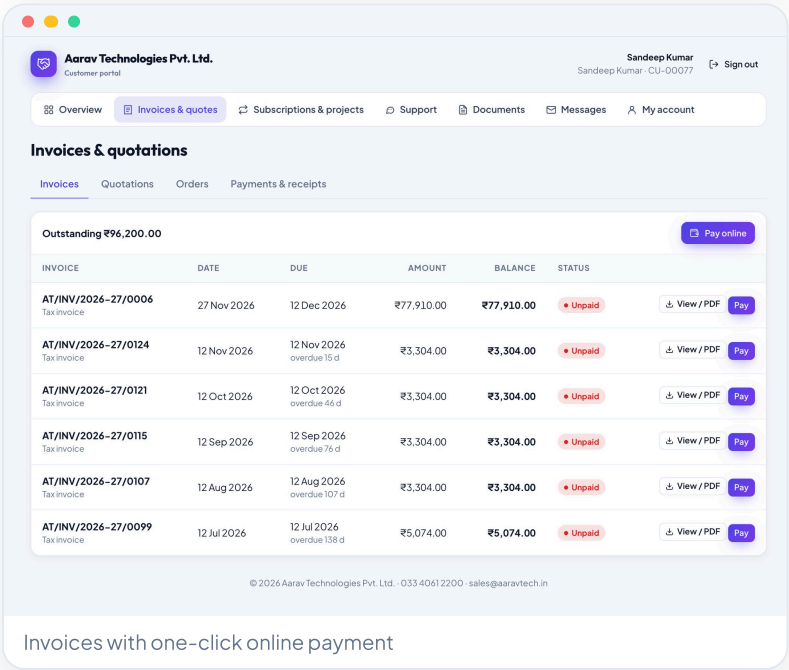
SELF-SERVICE

Customer portal

Give customers 24×7 access to their account. They view quotations and invoices, pay online, download receipts and statements, raise tickets and renew subscriptions — fewer calls for your team.



Customer portal overview: dues, quotes, tickets and renewals



Invoices with one-click online payment

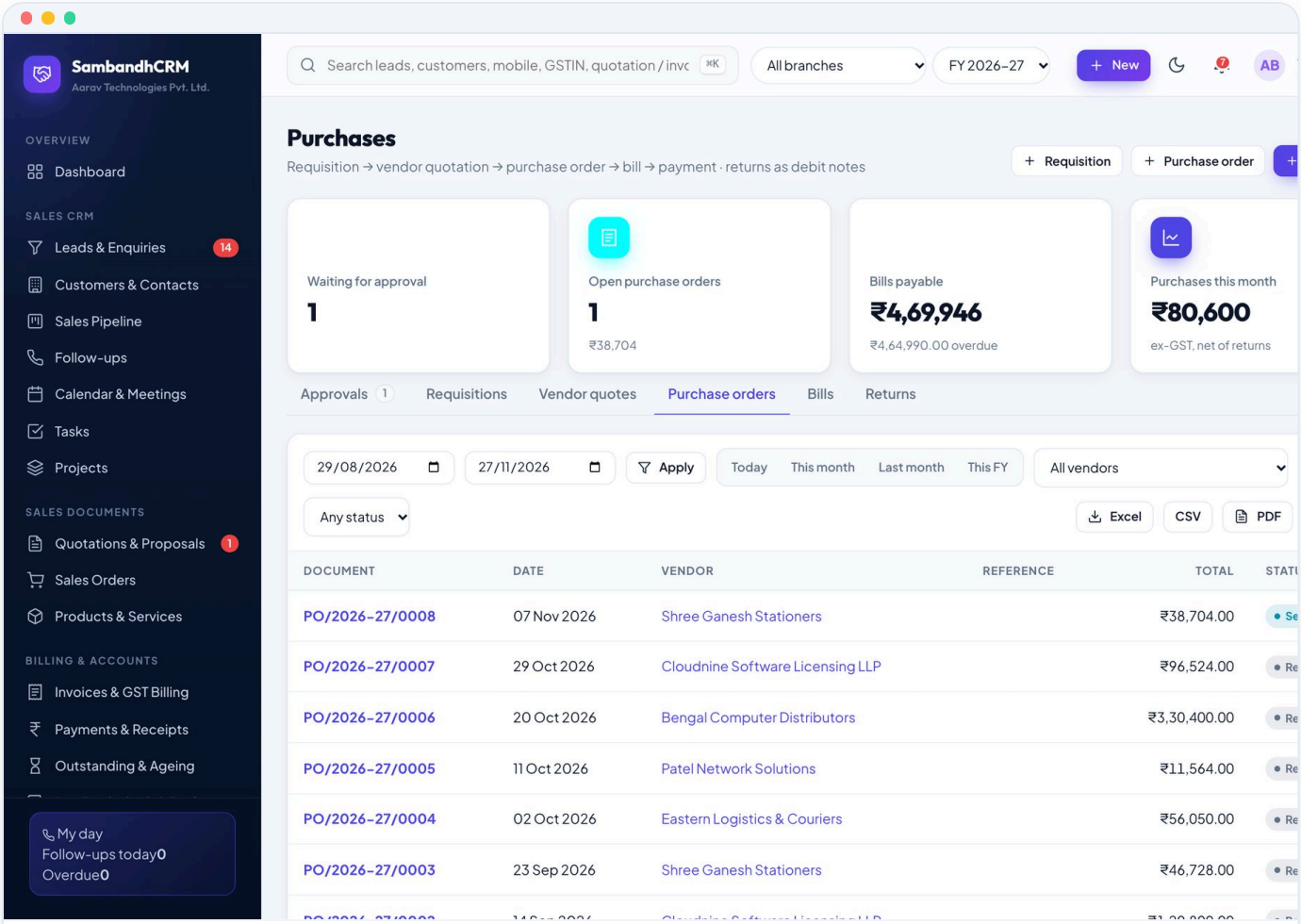
- Login by password or mobile OTP, self-registration
- Accept / reject quotations online
- Invoices, receipts and statement of account
- Pay dues online with Razorpay
- Raise and track support tickets
- Renew subscriptions and view project progress
- Share documents both ways

12

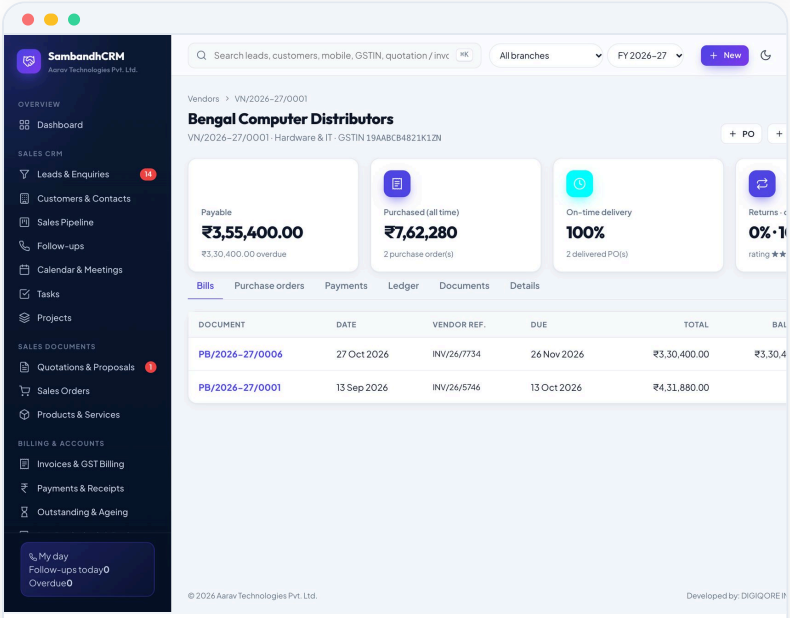
OPERATIONS

Purchases, vendors & partners

Control spending and grow through partners. Run purchases from requisition to payment with approvals, and reward channel partners and resellers with automatic commission.



Purchases: requisitions, POs, bills and returns



Vendor 360°: payable, ledger and delivery performance

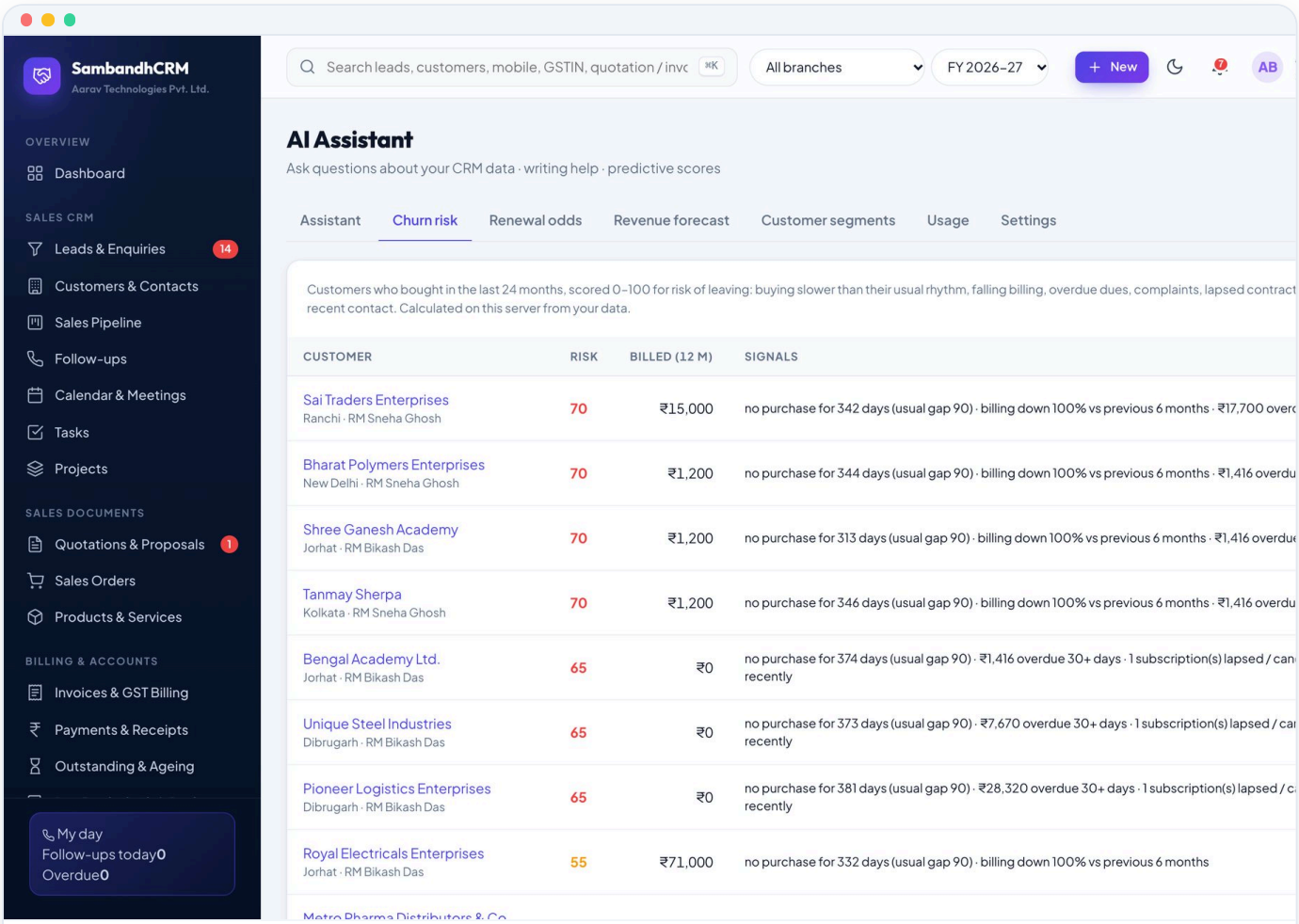
- Requisition → approval → PO → bill → payment
- Partial delivery tracking per PO line
- Input tax credit feeds GSTR-3B
- TDS, MSME 45-day rule, payables ageing
- Recurring expenses on autopilot
- Partners: lead sharing and commission with TDS

13

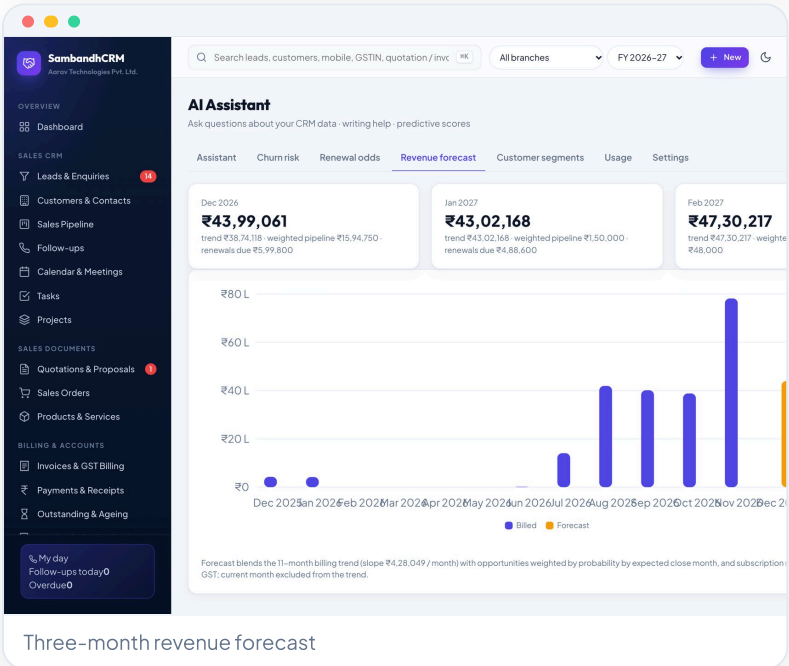
INTELLIGENCE

AI assistant & predictive insights

Ask your CRM questions in plain English — "Which invoices are overdue by more than 30 days?" — and get answers from your own data. AI drafts replies, analyses tickets, summarises meetings and suggests the next best action.



Churn-risk scores with the reasons behind them



Three-month revenue forecast

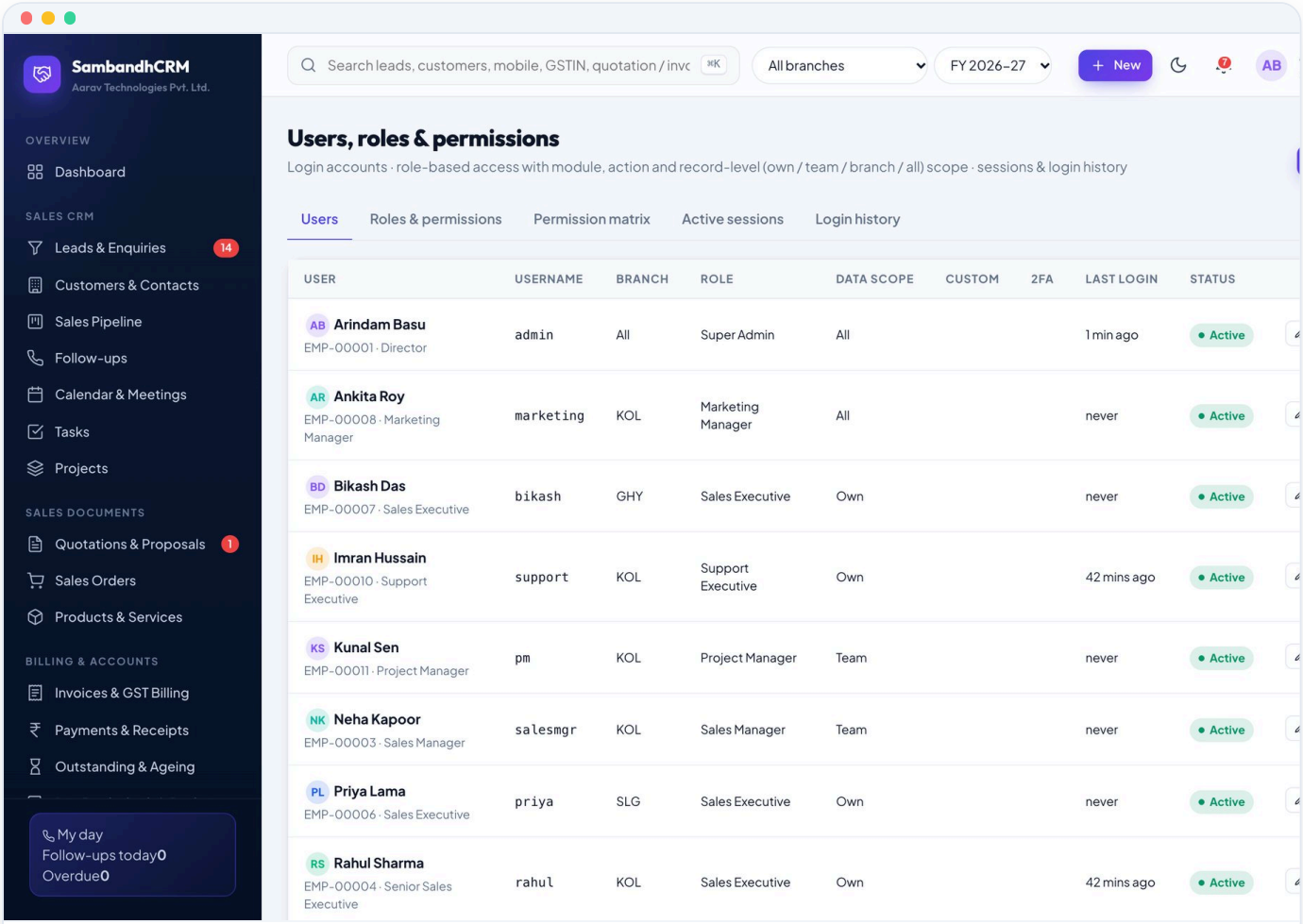
- Conversational CRM assistant (respects user permissions)
- AI reply suggestions for WhatsApp, email & tickets
- Ticket classification and sentiment
- Lead next-best-action with message draft
- Churn risk, renewal odds, RFM segments
- Website chatbot from your knowledge base

14

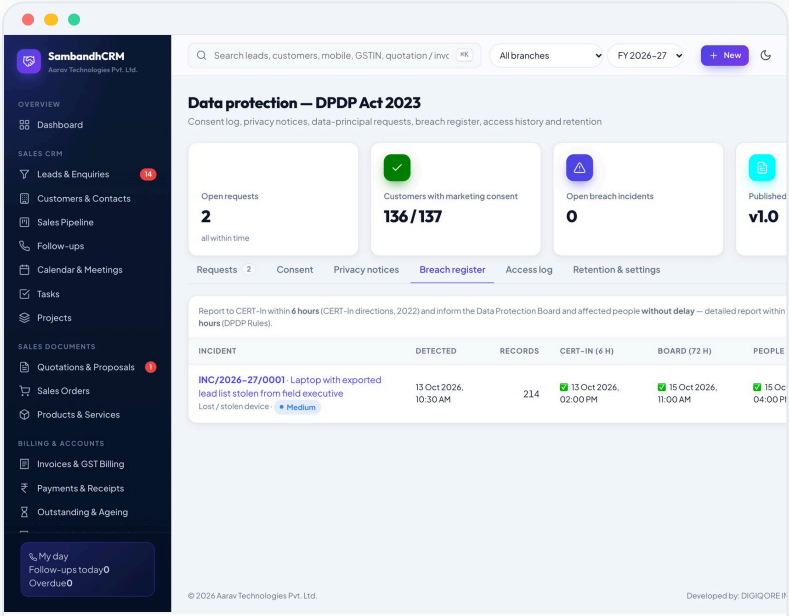
TRUST

Security, data protection & integrations

Enterprise-grade control for growing businesses: role-based access down to the record, a full audit trail, and DPDP Act 2023 compliance built in. Connect the tools you already use.



Users, roles and permissions with data scope (own / team / branch / all)



DPDP: consent log, requests and breach register

- 12 roles, module and action permissions
- Two-factor login, lockout, session timeout
- Complete audit trail and record-access log
- Consent per purpose, privacy notices, data requests
- Multi-branch data restrictions
- Tally, Zoho Books, Razorpay, webhooks & REST API
- Automatic daily backups

WHY CHOOSE US

A CRM your whole company will actually use

Designed and developed by Digiqore Info Solutions Private Limited — specialists in business software for Indian SMEs.

Built for Indian businesses

GST, TDS, MSME rules, WhatsApp-first communication and Indian formats — not an afterthought.

Your data, your server

Runs on your own hosting or ours. No per-user lock-in; export everything any time.

Customised to you

Fields, stages, templates, roles and reports configured to the way you work.

Local implementation & support

Setup, data migration, training and support from our team in West Bengal.

Fast and lightweight

Works on any browser and modest hosting; mobile app installs from the browser.

Grows with you

Multi-branch, multi-pipeline, partners and portal — switch on modules as you need them.

How we get you live

1. **Demo** — See it live with your use case
2. **Configure** — Your branding, masters, roles, templates
3. **Migrate** — Customers, leads, products, opening balances
4. **Train & go live** — Hands-on training for every team

Ideal for

IT & software services · Distributors & wholesalers · Manufacturers · AMC & service companies · Agencies & consultants · Education & training · Healthcare providers · Real estate & projects · Retail chains

Screens in this brochure show demo data from a sample company. Features are configurable; some integrations (WhatsApp Business API, payment gateway, Tally, Zoho, AI) need your own provider accounts.

SambandhCRM
BY DIGIQORE INFO SOLUTIONS PRIVATE LIMITED

Let’s build stronger customer relationships.

Book a free, no-obligation demo. We will show SambandhCRM with your own process — leads, billing, service and reports — and help you plan the move.

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