CAVALLO

CRM

Empower your sales team with prospect management tools

What is Cavallo's CRM module?

This CRM module is designed for sales teams to track and manage leads and opportunities, and optimize the organization of prospecting tasks for each day. Leverage this module to unite your sales prospecting processes with your order management solution, so you can easily transition from scoping a lead to closing a sale without having to switch software.

You should use the CRM module if:

- You're looking to speed up your sales cycle
- Your sales team finds it difficult to organize daily tasks and track lead interactions
- You're looking to extend the power and life of your Microsoft Dynamics GP investment

What does it look like in action?

Empower your sales team to make informed prospecting decisions with Cavallo's CRM module. Users can seamlessly move from forward-focused sales planning and lead capture to order entry and account management tasks, without losing valuable customer information or momentum. Use the Cavallo Today feature to track sales tasks as well as schedule daily actions and follow-ups, all while monitoring the status of opportunities in your sales funnel. Take even more off your plate with TeleSales' intelligently-generated call lists, so your sales team can feel confident that they're talking to the right people at the right time.

With the CRM module, you can:

- Search and run reports on opportunities
- Search for prospects
- Log CRM interactions
- Leverage Opportunity Card to track details associated with potential customers
- Run opportunity reports and audits

How can I expand my software tool kit?

Cavallo's CRM module is just one tool in your distribution software toolkit. Build out your complete distribution software solution with Cavallo's additional features and modules — including next-level functionality like automated tasks and workflow, CRM tools, EDI, barcoding, and plenty more. Elevate every process of your distribution management, from selling to order fulfillment to shipping and payment collection, and accelerate their efficiency by uniting them under one powerfully flexible solution.

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