

Perfex 3.2.0 + Addons Free Download

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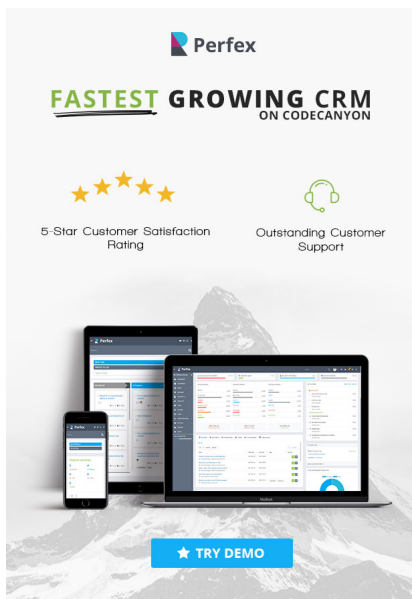
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Description

Perfex 3.2.0 + Addons Free Download

Perfex 3.2.0 + Addons – Powerful Open Source CRM



Main Features

The image displays a vertical list of 20 feature cards for Perfex CRM. Each card consists of a small screenshot of the software interface on the left and a text description on the right. The features listed are:

- PROJECTS**: Manage all your projects in one place. You can create projects, assign tasks, and track progress. You can also create sub-projects and manage them separately.
- INVOICES**: Create and manage invoices. You can create invoices, send them to your clients, and track their status. You can also create recurring invoices.
- SUBSCRIPTIONS**: Manage your subscriptions. You can create subscriptions, manage their status, and track their payments.
- ESTIMATES**: Create and manage estimates. You can create estimates, send them to your clients, and track their status. You can also create recurring estimates.
- PROPOSALS**: Create and manage proposals. You can create proposals, send them to your clients, and track their status. You can also create recurring proposals.
- EXPENSES**: Track your expenses. You can create expenses, track their status, and generate reports. You can also create recurring expenses.
- PAYMENTS**: Manage your payments. You can create payments, track their status, and generate reports. You can also create recurring payments.
- LEADS MANAGEMENT**: Manage your leads. You can create leads, track their status, and generate reports. You can also create recurring leads.
- WEB TO LEAD FORMS**: Create and manage web to lead forms. You can create forms, track their status, and generate reports. You can also create recurring forms.
- SUPPORT SYSTEM**: Manage your support system. You can create support tickets, track their status, and generate reports. You can also create recurring support tickets.
- CALENDAR**: Manage your calendar. You can create events, track their status, and generate reports. You can also create recurring events.
- CUSTOM FIELDS**: Create and manage custom fields. You can create fields, track their status, and generate reports. You can also create recurring fields.
- TASKS**: Manage your tasks. You can create tasks, track their status, and generate reports. You can also create recurring tasks.
- KNOWLEDGE BASE**: Create and manage a knowledge base. You can create articles, track their status, and generate reports. You can also create recurring articles.
- CONTRACTS**: Create and manage contracts. You can create contracts, track their status, and generate reports. You can also create recurring contracts.
- REPORTS**: Generate reports. You can create reports, track their status, and generate reports. You can also create recurring reports.
- GOALS TRACKING**: Track your goals. You can create goals, track their status, and generate reports. You can also create recurring goals.
- PERSONAL TODO LIST**: Manage your personal todo list. You can create items, track their status, and generate reports. You can also create recurring items.
- CUSTOMERS AREA**: Manage your customers. You can create customers, track their status, and generate reports. You can also create recurring customers.

More Features

CREATE GOOD LOOKING PROPOSALS

Send your clients a professional proposal in minutes. You can create proposals for any project, add your logo, and customize the content to match your business.

SEND ESTIMATES TO CUSTOMERS

Send your estimates to customers via email or print them out. You can also track when your estimates are viewed and when they are accepted.

ADJUST MENU ITEMS

Adjust the menu items in your CRM to match your business. You can add, edit, or delete items, and you can also set prices and taxes.

TRACK TIMERS BY MULTIPLE MEMBERS

Track the time spent on each project by multiple team members. You can view a detailed report of time spent, and you can also track time spent on each task.

EASILY COPY TASKS

Copy tasks from one project to another. You can copy tasks, including their details and assignments, to a new project.

CHANGE COLOR STYLES

Change the color styles in your CRM to match your business. You can choose from a variety of color schemes, and you can also create your own.

TIMESHEETS REPORTS

Generate reports on your timesheets. You can view reports on time spent, and you can also export reports to PDF or Excel.

PROJECT MILESTONES

Set milestones for your projects. You can track the progress of your projects, and you can also set reminders for milestones.

E-SIGNATURE

Sign documents electronically. You can sign documents, contracts, and invoices, and you can also verify the authenticity of signatures.



GDPR COMPLIANCE

Perfex CRM is a GDPR compliant CRM system. We have implemented all the necessary measures to ensure your data is safe and secure.

Why Choose Perfex CRM?

- 1. Regular System Updates**
★★★★★
We are committed to providing you with the latest features and improvements. Our development team works hard to ensure you always have the best version of Perfex CRM.
- 2. Customizable CRM System**
★★★★★
Perfex CRM is a highly customizable CRM system. You can tailor the system to match your business needs, from the look and feel to the functionality.
- 3. Mobile CRM System**
★★★★★
Perfex CRM is a mobile CRM system. You can access your CRM from anywhere, at any time, using your smartphone or tablet.
- 4. Excellent Customer Support**
★★★★★
We have a dedicated customer support team that is always ready to help you. Whether you have a question or need assistance, we will be there for you.
- 5. Excellent Performance**
★★★★★
Perfex CRM is a fast and reliable CRM system. We use the latest technologies to ensure our system is always up and running.
- 6. Excellent Security**
★★★★★
We take security very seriously. We have implemented all the necessary measures to ensure your data is safe and secure.
- 7. Excellent Integration**
★★★★★
Perfex CRM integrates with a wide range of third-party applications. This allows you to streamline your workflow and improve your productivity.
- 8. Excellent Reporting**
★★★★★
We have a powerful reporting system that allows you to track your business performance. You can generate reports on a variety of metrics, and you can also export reports to PDF or Excel.

Perfex CRM is self hosted Customer Relationship Management software that is a great fit for almost any company, freelancer or many other uses.

Perfex CRM is self hosted Customer Relationship Management software that is a great fit for almost any company, freelancer or many other uses. With its clean and modern design, Perfex CRM can help you look more professional to your customers and help improve business performance at the same time.

Managing customers is important and Perfex CRM helps in several ways:

Manage and invoice projects with the powerful Project Management Feature.

- * Link tasks to many Perfex CRM features and stay organized.
- * Build professional, great looking estimates and invoices.
- * Powerful support system with ability to auto import tickets.
- * Track time spent on tasks and bill your customers. Ability to assign multiple staff members on task and track timer per assigned staff.
- * Add task followers even if the staff is not project member. The staff member will be able to track the task progress without accessing the project.
- * Keep track of leads in one place and easily follow their progress. Ability to auto import leads from email, add notes, create proposals. Organize your leads in stages and change stages easily with drag and drop.
- * Create good looking proposals for leads or customers and increase sales.
- * Records your company/project expenses and have the ability to bill to your customers and auto convert to invoice.
- * Know more about your customers with powerful CRM.
- * Increase customer retention via built-in Surveys.
- * Use the Goals Tracking feature to keep sales goals in mind.
- * Create announcements for your staff members and customers.
- * Use Contracts feature to lock in current and future sales.
- * Custom fields can store extra information for customers, leads and more.
- * Receive payments from Paypal and Stripe in different currencies.
- * Tons of configurable options.
- * Style the CRM to your company branding with the powerful theme styling feature.
- * Separated media folder for non-admin staff members to work inside the CRM and organize their uploads and files.
- * Great looking calendar for each staff member based on staff permissions.
- * Follow ups, reports, notes, files and many more features.

CRMs need to focus on customers and Perfex CRM does that with a powerful support system that helps you track and resolve issues quickly via the integrated ticket system and customer reminders. Assign reminders to yourself, one or many staff members and with one click, reminders can be sent to email and in-app notification system. These features and more can take customer satisfaction to the next level.

Perfex CRM has many features designed to fit many applications. Read more about the features below and try the demo to see how Perfex CRM can help you succeed.