Introducing coreBOS CRM

Introducing coreBOS concise and at a glance

- ### What is coreBOS?

It is an IT platform for service companies of any size. As an evolution of SugarCRM and vtigerCRM, it comes from the world of **CRM** but has evolved into the model of ERP to consider issues that fall outside the world of CRM, such as: **billing, collection management, supplier management, financial management, data analysis, reporting and Big data.**

- ### What is a CRM?

In case you didn't know, a CRM is a computer system to basically do two things:
- **Contact management**
- Programming of **commercial activities,** ie track and schedule actions to achieve sales over time.

It has been built on a constellation of **tools** and **technology platform** on which to achieve the ideal system for your company information.

- ### What can coreBOS do for my company?

This is the **coreBOS challenge**: **Comprehensively manage** your company in a unified way with the ability to communicate with third party systems in the way you need.
Comprehensive here means: **BEFORE, DURING and AFTER SALES**. And all the tools the **manager and director need**: **BIG DATA, reports, alerts, BPM and 360% vision**.
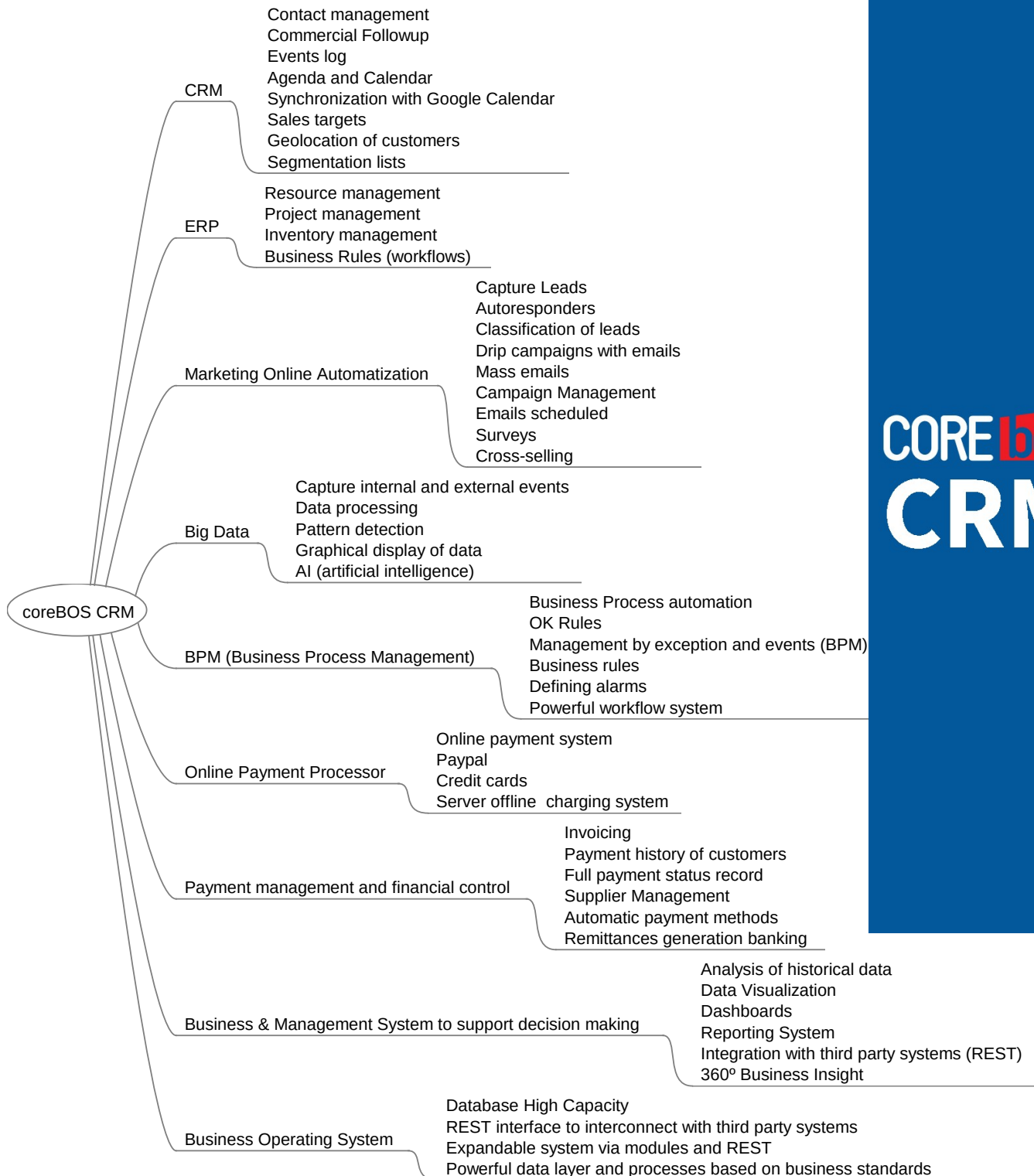
Ask us if you need more information

Who is coreBOS for?

- **Service companies of any size that want to computerize their business**: where services are the main product to be sold.

- **Companies wishing to professionally manage their sales department**: calendar, tracking, sales funnel, sales targets.

- **Companies that want to manage their sales service** (tickets, job reports, incidences, projects)

- **Companies who want or need to automate processes** to achieve cost reduction.

- **Companies who wants to start using Online marketing and automate it**: capturing leads through their website, autoresponders, automated management of publications, sending series of training and education material for raising potential opportunities, lead nurturing.

- **Companies that want to unify all their information in a single system** and eliminate the spread of information they currently have.

- **Entrepreneurs who want to get more visibility for their business** by: dashboards, reporting, Business Intelligence, Big Data, reports and graphic display of data.

If you don't find your profile in this list, ask us and we will tell you whether coreBOS is or not for you.

- **So, is coreBOS more than a CRM?**
  Yes, in summary at a glance

CRM
- Contact management
- Commercial Followup
- Events log
- Agenda and Calendar
- Synchronization with Google Calendar
- Sales targets
- Geolocation of customers
- Segmentation lists

ERP
- Resource management
- Project management
- Inventory management
- Business Rules (workflows)

Marketing Online Automatization
- Capture Leads
- Autoresponders
- Classification of leads
- Drip campaigns with emails
- Mass emails
- Campaign Management
- Emails scheduled
- Surveys
- Cross-selling

Big Data
- Capture internal and external events
- Data processing
- Pattern detection
- Graphical display of data
- AI (artificial intelligence)

BPM (Business Process Management)
- Business Process automation
- OK Rules
- Management by exception and events (BPM)
- Business rules
- Defining alarms
- Powerful workflow system

Online Payment Processor
- Online payment system
- Paypal
- Credit cards
- Server offline charging system

Payment management and financial control
- Invoicing
- Payment history of customers
- Full payment status record
- Supplier Management
- Automatic payment methods
- Remittances generation banking

Business & Management System to support decision making
- Analysis of historical data
- Data Visualization
- Dashboards
- Reporting System
- Integration with third party systems (REST)
- 360º Business Insight

Business Operating System
- Database High Capacity
- REST interface to interconnect with third party systems
- Expandable system via modules and REST
- Powerful data layer and processes based on business standards

coreBOS CRM

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CRM

- **What is the difference between coreBOS CRM and Vtiger 6.x?**

The vtiger crm 5.4 project bifurcated into two branches, namely:

coreBOS which is the natural evolution of vtiger 5.4, following on the basis of existing and tested code. The name has changed for copyright issues but really it is version 6 of vtiger crm.

.Vtiger 6.x: a focused solution to a proprietary SaaS and On Demand which provides an open source version that is different from the commercial version. This version has really been a complete re-writing of the code, that means:

1) **VERY DIFFICULT UPDATE**: any custom code you have needs to be rebuilt,

2) **A LOT OF BUGS**: new code, new bugs.

3) **LOST FEATURES**: Many features have disappeared because they were not implemented.

4) **BACK TO THE START**: in many cases, because it is a rebuilt system, we must re-learn how to build and how to use the system. In other words: a new program but with the same name.

- **Advantages of coreBOS:**

1) **SIMPLE AND NATURAL UPDATE:** continuity on a stable and tested code base.

2) **FULL FUNCTIONALITY**: Authentic Open source. Only one flavor.

3) **SUPPORT**: Freedom to dispose of most of the vtiger community partners 5.x

4) **EVOLUTION**: There are plenty of new features right now by not having to rewrite all the existing code.

5) **IN THE MAIN STREAM**: Easy migration to coreBOS platform.

6) **AUTONOMY AND SPEED**: Autonomy and quick incorporation of features, optimizations and correction of bugs detected.

7) **RELIABILITY**: Ensuring reliability to be based on a model of truly open collaboration.

- **How do I get it?**

There are two simple ways to get **coreBOS CRM**:

▶ **GETTING A "QUICK SETUP PACK" FOR COREBOS**

This **implementation** pack serves to collect your **requirements** and basic adaptions through a series of **interviews**; it also includes **user training and administration** for internal use. With these interviews we achieve also **proposals and recommendations** to improve the coreBOS system.
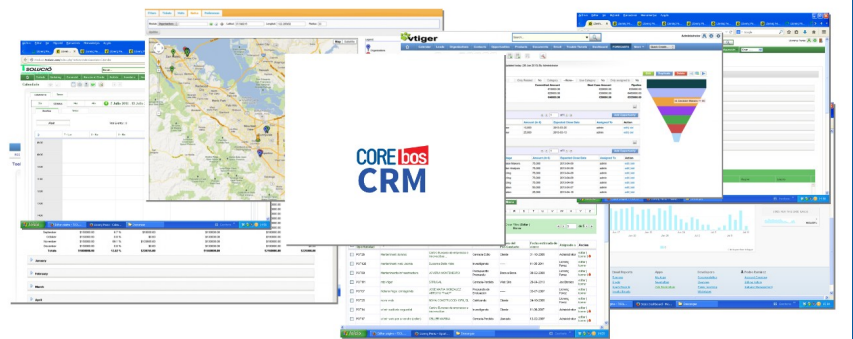
This is a service that **speeds up the implementation process.**

This Pack includes:
- Collecting **initial requirements**
- Initial basic **advice**
- **Sessions of adaptation and customization** of CRM
- Completing the **implementation detected and included**
- **Users validation**
- **Training users**

▶ **DOWNLOAD DIRECTLY FROM GITHUB**

The second alternative is **DIY** (*Do It Yourself*) option. If at any time you need our help or from any of our partners, you can get it without any problem.

CoreBOS = Freedom + Empower + CRM + ERP + BPM + BIG DATA

• ¿What does it cost?

coreBOS is a completely free Open Source product that we use in our customers' facilities. In the same way you can get it.

Over time **we have developed a number of modules and extensions around the product** that we can not include in the accessible version, either because they are very specific to a particular sector or because they are incompatible with each other. Some of these modules we release openly, others we put on sale and many others we make available to those who purchase the **coreBOS CRM annual subscription**, so they can decide which they need to install.

The **subscription** also gives you access to some **verticalizations** we have created. That is, **a selection of modules created to serve a particular market sector** and joined **harmoniously** in a specialized application but based on the open source version. We give you the job done and, what is more IMPORTANT, we **keep it up to date and synchronized with the OpenSource version for you while you have an active subscription**.

Our **main subscription product** is the **verticalization for online marketing** and some of the **accessible modules** are: *Sales targets, Maps, Discount lines, Mass actions on emails and assignments, Segmentation Lists, Lock Record Editing, Advanced Menu Editor, Integrations with SendGrid, OpenOffice, MailChimp, Google Drive, Dropbox, and many more that we keep adding every day.*

* The Subscription only gives you access to the code, it does **not include support**, for that we have a support service plan that fits your needs, so do **not hesitate to ask!**

• Some of the additional modules not included

Other modules included in subscription are:

- **TSDomains**
- **Forecast**
- **Maps**
- **DiscountLine**
- **MassDocumentImport**
- **MultiWarehouse**
- **TSInvoiceSO**
- **vtDocsTreeview**
- **GenDoc**

With the **annual subscription** you can **access all of these modules**, or you can purchase them separately; you choose.

• How soon can I have my system running?

coreBOS CRM facility "as is" can be done in **minutes**.

If you activate a **"Quick Setup Pack"** with customization, you can have your system ready in **1 week to 10 days as usual.**

- **Is there a coreBOS CRM implementation paradigm for use in large projects?**

Yes, actually we use our development paradigm focused on business processes, where we centralize all the work detected by consulting and analysis to identify existing processes in the company interviews.

We build that list, we order it, we polish it and validate it.

From that moment, all the development, implementation, training and setup is led by that list of essential processes. Everything else is delayed, with no exception.

For each process, we create a unique interface for it, with maximum usability, simplicity and power. This can significantly reduce development time, learning curve, system validation and starting time.

With this approach we get the maximum impact with minimum effort as we procrastinate everything that does not add value to the company. Leaving these details for when the customer has time or resources to do them.

- **Can I integrate my coreBOS with other programs or systems?**

Of course, in fact one of coreBOS CRM strong points is its capacity for integration and communication with other systems. The REST interface allows us to make coreBOS "talk and listen" with other systems quickly, in a powerful and very safe way.

- **Is coreBOS CRM safe?**

coreBOS CRM runs on the PHP language, Apache technology incorporating the **know-how of current security**. The **coreBOS system** properly installed, configured with good passwords and updated to fix security issues that can be detected; will allow us to achieve a sufficient and reasonable **degree of safety.**

This combined with an appropriate **policy of backups**, gives us the peace we need.

We recommend our hosting service for coreBOS systems specially configured and monitored by experts in servers and computer security.

Our **programmers** are formed in the **OWASP guidelines** and recommendations.

We are constantly improving the security of the code.

- **Where can I install coreBOS?**

coreBOS CRM system needs a LAMP (**recommended**): **Linux Server, Apache, MySQL and PHP**
On Windows it also works with the same stack.

The other requirements are the typical ones: 200 MB of fast hard drive and 4 GB of RAM. Although the more RAM, the better.

- **Is coreBOS a Cloud Solution?**
Yes, coreBOS is a **cloud solution**. In fact it is built to work in the cloud, **accessible from anywhere at any time of day**.

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CRM

• **How is coreBOS evolving?**

Currently the most vivid and exciting trends of development are:

PROCESSES (BPM):
Automation of business process following good practices in the market, giving the job done to entrepreneurs and their companies. We use the powerful **Workflow and Business Rules system** for this. It will allow us to model our business and turn it into an efficient system.

INTERFACES (FRONTEND):
Development and implementation of new screens to access the system and building tools for easy interaction with coreBOS and hiding all its complexity.

BIG DATA(IA):
Discover information, rules, patterns and draw conclusions (data mining) from all the information generated from **coreBOS** and from other parts of our business ecosystem: *websites, forms, real world events*; integrating all within coreBOS which then becomes a real information integrator and processor, a full Enterprise service bus (ESB).

MONITORING BUSINESS (VISION):
Provide tools for monitoring and follow-up of the company and its critical processes to get insight about what happens in our business to be able to anticipate and take great decisions. *Dashboards, Rules OK, alerts and activity monitors* to see, to detect, and to take the best decision.

Download coreBOS
↗ https://github.com/tsolucio/corebos

Ask us for more information
↗ info@tsolucio.com

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