



Business Proposal

Adwing CRM+

A connected platform for sales, billing, finance, communication and team operations.

Purpose Centralize business operations and improve follow-up, revenue visibility and accountability.	Ideal For Service businesses, software resellers, agencies, consultants and growing local enterprises.
Deployment Browser-based CRM with Google ecosystem integration and role-based user access.	Customization Modules, fields, reports and workflows can be adapted to business requirements.

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EXECUTIVE SUMMARY

A practical CRM for businesses that need control, visibility and faster action

Adwing CRM+ brings customer management, sales, billing, finance, communication and internal team operations into one connected system. It is designed for businesses that currently depend on scattered spreadsheets, WhatsApp chats, manual follow-up lists and disconnected billing records.

1

Unified customer database

5+

Business functions
connected

6

Standard user roles

24x7

Browser access

What this solution helps you achieve

Better Follow-up

Never lose track of enquiries, proposals, calls, dues or next actions.

Faster Billing

Create structured invoices, record payments and monitor outstanding amounts.

Clear Visibility

See sales, collections, expenses, tasks and business performance in one place.

Team Accountability

Assign tasks, monitor activities and provide role-based access.

SOLUTION ARCHITECTURE

From enquiry to revenue - one connected business workflow

Every module is connected so your team can move smoothly from lead capture to proposal, client conversion, invoice, payment and long-term support.

1

Lead Capture

Store enquiry details, source, status and next follow-up.

2

Follow-up

Schedule calls, meetings and next actions.

3

Proposal

Create structured proposal records and monitor status.

4

Client Conversion

Move confirmed business into the client database.

5

Invoice & Payment

Bill the client, record collections and track balances.

6

Service & Support

Use tasks, communication and activity tracking for ongoing delivery.

Core solution areas

CRM & Sales

Leads, follow-ups, clients, proposals and pipeline tracking.

Billing & Finance

Invoices, payments, income, expenses and financial summaries.

Communication

WhatsApp, email templates, communication logs and reminder centre.

Team Operations

Employees, tasks, calendar, activity and role-based access.

Capture every opportunity and move it toward conversion

Adwing CRM+ gives your sales team a structured process for handling prospects, client information and deal movement.

Module	What it does	Business value
Leads	Captures name, company, phone, email, source, status, deal value and next follow-up.	No enquiry gets lost; sales records remain complete.
Follow-ups	Schedules calls, meetings, reminders, status and notes.	Improves consistency and conversion discipline.
Clients	Maintains confirmed customer records, service details, billing data and notes.	Creates a reliable client database for billing and support.
Proposals	Stores proposal number, value, validity, service, description and status.	Makes quotation tracking simple and professional.
Sales Pipeline	Tracks opportunity stage, expected value, probability, owner and closing date.	Provides a clear view of future revenue.
Products & Services	Maintains service catalog, pricing references and standard offerings.	Reduces repeated data entry and improves consistency.

Recommended outcome

- Faster response to new enquiries
- Clear ownership and next action for every opportunity
- Better proposal follow-up and expected revenue visibility
- Organized customer records for long-term service

Turn confirmed business into controlled revenue operations

The finance layer helps track invoices, receipts, outstanding balances, income, expenses and business performance.

Invoices

Create invoice records with invoice number, client, dates, totals, status and balance due.

Payments

Record payment date, amount, mode, reference and balance against the invoice.

Outstanding

Identify due and overdue invoices for collection follow-up.

Income & Expense

Capture other income and daily business expenses for a wider financial view.

Finance dashboard visibility

Total Invoiced	Value of invoices raised in the selected period.
Total Collected	Payments received and recorded against invoices.
Outstanding	Pending receivables requiring follow-up.
Income vs Expense	Operational financial summary and estimated profitability.

Business impact

- Improved cash-flow monitoring
- Faster collection follow-up
- Clear separation of invoices, payments and outstanding dues
- Better visibility of revenue, costs and business performance

Keep every message, reminder and internal action organized

Adwing CRM+ combines customer communication with internal task management so your team can work with better consistency.

Communication Centre

- Reusable WhatsApp and email templates
- Click-to-chat WhatsApp message preparation
- Direct business email sending
- Communication history and status log
- Reminder centre for invoices, follow-ups and tasks

Team Operations

- Employee directory and internal records
- Task assignment with priority and due date
- Calendar view for operational deadlines
- Activity log for accountability
- Role-based access for different teams

Typical communication use cases

Use Case	How CRM helps
Lead Follow-up	Send a standardized WhatsApp or email message after enquiry.
Proposal Reminder	Follow up before proposal validity expires.
Payment Reminder	Contact clients for due or overdue invoices.
Service Update	Send implementation, support or delivery status updates.
Internal Task	Assign follow-up or support work to the appropriate employee.

MULTI-USER SECURITY & PERMISSIONS

Give every user the right level of access

Adwing CRM+ supports secure login, password protection, role-based module access and action-level permissions.

Role	Typical responsibility	Suggested access
Super Admin	Owner or system controller	Complete access including users, roles and security
Admin	Operations manager	Full operational access across CRM, finance and team modules
Sales	Lead and client acquisition	Leads, follow-ups, proposals, pipeline, clients and communication
Accounts	Billing and collection	Clients, invoices, payments, finance, reports and communication
Employee	Assigned operational work	Tasks, calendar, selected CRM modules and communication
Viewer	Management review	Read-only access to selected reports and dashboards

Protected Login

Dedicated CRM login, session control and timed access.

Password Security

Hashed password storage, temporary password change and failed login lock.

Access Audit

Login, logout, failure and important user events are logged.

IMPLEMENTATION PLAN

A structured rollout for faster adoption

The final implementation can be customized according to business size, team roles, data volume and reporting requirements.

1	Discovery Understand business workflow, users, services, billing process and reporting needs.
2	Configuration Set up modules, fields, statuses, roles, templates and company settings.
3	Data Preparation Clean and import leads, clients, products, outstanding invoices and employee records.
4	User Setup Create user accounts and configure role-based access.
5	Testing & Training Test complete workflows and train Admin, Sales and Accounts users.
6	Go-Live & Support Deploy the CRM, monitor initial usage and provide stabilization support.

Deliverables can include

- Configured Adwing CRM+ web app
- Google Sheet database with structured modules
- User roles and permissions
- Company settings and message templates
- Basic data import support
- User training and go-live guidance
- Optional customization and future module expansion

PROPOSAL OPTIONS

Flexible implementation based on your business requirements

Commercial terms depend on modules, number of users, customization, data migration and support scope.

Starter	Business	Custom
For small teams needing lead, follow-up and client management. - Leads & follow-ups - Clients - Basic dashboard - Up to 3 users - Basic setup Pricing: Custom quotation	For growing teams requiring sales, billing, communication and finance. - Complete CRM & sales - Invoices & payments - Finance reports - Communication centre - Role-based users Pricing: Custom quotation	For organizations needing tailored workflows and advanced modules. - All Business features - Custom fields & reports - Data migration - Workflow customization - Priority implementation support Pricing: Custom quotation

Ready to organize and grow your business?

Book a live demonstration and discuss the right modules for your team.

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Website: adwingtechnologies.com



Note: Final scope, timeline and commercial quotation will be confirmed after requirement discussion.