CRM – Ecommerce – Bookkeeping

SaaS Software

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https://vontikakis.com/justlook

Intro - Features

Every business needs some type of software to operate efficiently, so we created the necessary software your to sell product and services online, organize your sales and your customers and doing your bookkeeping easy. We use the SaaS model which offers the flexibility for you to use and pay only for the resources you need, as result to avoid initial fixed costs which is a barrier for new businesses. You create can a trial account test our application from the following link https://vontikakis.com/justlook

Module Crm

- Leads, accounts management and automatic lead scoring
- Contact management, bulk import your contacts from csv file
- Email scheduling, click and open tracking, to see who opened your email when was opened and what links clicked , also you can connect (connect your current email account with your smtp credentials)
- Send bulk sms to groups of your contacts to notify them for new offers
- Sync your contacts with facebook custom audiences to serve ads to you current client list or to similar audiences

Module Eshop

- Connect your own domain or if you have already have a website and you want to attach an eshop quickly you can use an subdomain.
- Product Catalog if you want a full feature eshop or single product payment pages
- Accept credit card payments by connecting your vivawallet.com account
- xml prroduct feeds to publish your products in marketplaces like skroutz.gr or to create a facebook product catalog feed so run Facebook Product Dynamic Ads
- facebook pixel for executing an remarketing strategy through facebook ads
- google analytics to measure and analyze your traffic,

- promo codes to offer discounts during checkout process

<u>Module Bookkeeping</u>

- Single Entry Bookkeeping system
- Report per bookkeeping account and Vat report
- Print your book
- Customers -Vendor report and generation of xml files for submiting to greek tax authorities
- Add second account user to give access to your accountant

Manual

Product Catalog

If you want sell products and services online through our system you can easily integrate a simple shopping cart in your website or to have standalone product catalog under the domain of your choice. If you want a catalog with many products, that your clients can add multiple products in shopping cart, see the following steps.

To activate the multi product catalog

1. Go to Settings Page
2. Press the link Ecommerce
3. In section Store, press the switch *Store Mode* to be active
4. Activate the catalog switch button
5. Also activate Multiple Items Carts switch button

After this go to products pages and choose the products that will be published in your catalog

To publish a product in your online catalog

1. You have to go page products
2. Create a new product or edit an existing one
3. In product information section, status have to be active
4. In online store section, switch button *product in store* have to choose visible option

Also you can create add specific attributes in each product and create product variations

Payment Gateway

One of the most important features for an eshop is to accept payments online with a credit card, in our platform is possible to accept credit cards because we have an integration with vivawallet, the only requirement is to have an active vivawallet merchant account and in minutes you can connect your eshop with this payment gateway and statring accept payments. If you have a request for another gateway just let us know.

To connect the vivalwallet just go to

1. Go to Settings Page
2. Press the link ecommerce
3. Navigate to section payment methods
4. Tick the box payment gateway
5. In fields Merchant Id, Api Key, Source enter the info that you can find in your vivawallet account and credit gatway is connected
6. Press Save

Domains and Subdomain

If you have already a website and you want to integrate quickly a simple eshop, so to sell product and services onlline and accepting a credit card payments, you can do it by using a subdomain. You have to create a subdomain in current domain in the following form with the following form.

http://eshop.mywebsite.com

These can be done by creating a C Record in your dns panel and point this record to the ip of our system. If you want to map you main domain directly to your eshop then your have to point the A record to our server.

To connect a subodmain

1. Go to Settings Page
2. Press the link Domain Names
3. In the field Custom Domain enter your domain or your subdomain
4. Also there are the ip of the servers that you have to enter to A or C dns Records

Facebook Pixel

When you run marketing campaigns in facebook to drive traffic to your eshop, it's a good idea to have install facebook pixel in your website. It's a piece of code that you can find your facebook advertisement account and it's easy to install it in your website. In this way you can use facebook ads as a retargeting tool. Let's take the following scenario, if you have somebody that visit a product in your eshop or a page in your website when he visits his facebook account, fb identify that he was a visitor in your website, and show him your ads. Because it' a nurturing tool for your potential clients, to make a sale, your potential client have to see the product multiple times.

To install fb pixel in our ecommerce platform you have to

1. Go to Settings Page
2. Press the link ecommerce
3. Navigate to section analytics

4. In the section analytics enter the facebook unique id Facebook Pixel
5. Press Save

Google Analytics

If your run an eshop or any other type of website is important to monitor the visitors. One of the best tools to do it, is with google analytics you will able to see how many people visit your website per day, which are the sources of the web traffic and see a lot of other data such the visitors that are coming from search engines, social media, email campaigns. In ppc campaigns you monitor the visitors and conversions rates of your sales, so to be able to optimize your budget.

To setup google analytics

1. Go to Settings Page
2. Press the link Ecommerce
3. In sections analytics in the field Google Analytics ID enter the unique identifier for your website which have form similar to the following *UA-4043777-3*
4. Press Save

Discount Codes

Promo codes and discount codes, is important tool for your sales growth stategy, a customer can apply a discount code during the checkout process. In our system there are two types of codes, a percentage discount and fixed amount discount. These can be used during holiday/season offers, in abandoned carts to send an email to your potential customer customer email as motivation to complete the transaction or you can offer them as motivation to subscribe to your newsletter.

1. Go to settings Page
2. Press the link Discount Codes
3. Press the button New Discount Code
4. Enter the name of the discount code etc SPRINGSALE10
5. In Condition choose the type fixed or percentage, enter the amount
6. Press the button Save

Publishing to Market Places

One of the basic features that an eshop need to have, is the ability to publish products in online marketplaces and price comparison engines. This can be achieved if your eshop supports product feeds, which is the presention of your catolog data in various xml formats and structures. In our system you can easily create product feeds for marketplaces like skroutz or create facebook product catalog and export directly tou your facebook advertisement account for more efficient and details ads displaying.

To create a new feed

1. Go to settings Page
2. Press the link Product Feeds
3. Press the button New Feed
4. Enter the name of the discount code etc SPRINGSALE10
5. In Wrap Template enter wrap template format
6. In Template enter single product item format
7. press save

Bulk sms Sending

If you are in charge of the operations of an eshop or even physical shop is important to able notify your current clients for new arrivals and flash sales. You could do this using bulk sms, is more efficient tool than email for increasing your local sales because can achieve higher open rate. There are various other cases that you can use sms, such as include links that point to surveys or contests. The branding is important factor in your campaigns so you can send sms with a sender id that is your company's name.

To setup sms

1. Go to Settings Page
2. Press the link Edit Sms
3. In the field Sms Sender ID enter your company's name, max characters are 10
4. Press Save

In 24 hours we will approved you Sms Sender ID, you will able to send sms through our system.

Contacts - Customers

The contact section is one of most important parts in a CRM and an e-commerce system, in our platform you can bulk import your contacts from csv file and map the csv columns to the contact fields. After you make the import you will be able segment your contacts in groups called which are called audiences. You can send your marketing message in each groups through various medium channel like bulk sms, bulk email, facebook ads, facebook custom audiences. You can promote effectively each of your product or service to most relative group of contacts and make A/B test your message in each audience

For example you can import your contacts from your linkedin account to our system, press the following link to export your contacts in a csv file and download it in your computer download linkedin contacts

To import your contacts

1. Go to Contacts
2. Press the button Import
3. Press the browse button and find the file in your computer
4. Press Continue
5. Map Fields map the columns from csv file tou for example in ?Column 2 (Last Name)? choose from the dropdownlist in right Last Name
6. Tick the box skip the first row
7. Press the button import

Email Advanced Features

Email is important tools for a sales person is the email, when you connect your email account to our system you can add more functionality in your email. We implement the pixel and click tracking methods, that means that when you sent an email , you will be able to see if recipient have opened the email and when was opened. In case you include links in your emails, you can see which of them have have been clicked, additional feature that you can schedule your email to be send in specific hour and also to include your profile photo.

The following steps are an example on how to connect a gmail account

1. Go to Settings Page
2. Press the link Smpt Settings
3. Address field you enter smtp server domain in our case *smtp.gmail.com*
4. In field username your email address
5. In field port the number *465*
6. In password you will not enter your gmail pass, but you will in google application password in this link https://security.google.com/settings/security/apppasswords
7. In field encryption choose *ssl*
8. Press save

Facebook Custom Audiences

One of the best features that we have in our system is that you synchronize your contacts with facebook custom audiences. Let's say that your already have customer base which includes the email or phone number, you will able to choose which of your contacts of your current your client list to import in a facebook custom audience. That means when you run ad campaigns in facebook you have the option to display them only in your current customers. The same feature you can use it also to create look alike audiences from your customer base, that means that facebook will display ads to potential customers that have similar characteristics to your current customers.

To connect our system with your facebook advertisement account

1. Go to Audience Page
2. Press the button Create Audience
3. If field name enter the name of the audiences
4. In Facebooks Account ID enter your facebook advertiment id
5. Choose Yes your Facebook Audience
6. Press the button Create
7. Press if you press the button Add Contacts will add all your contact in this audiences

Leads, Account Potentials

As sales person you have to keep notes on your business calls, promote constantly your business, research and qualify new clients. Keeping all of these data in spreadsheets can be messy, but with a good crm system you can access and filter your records in seconds from anywhrere. In our system we have all the necessary features that needs a saleperson to work efficiently. Some of them are the leads section which represent your potential clients, the accounts which are your current clienets, and the potentials which are the deals or contracts which you are negotiate.

To create a new lead

1. go to page leads
2. press the button New Lead
3. In select list stage choose the appropriate stage of the lead

1. In company field enter the name of the company's that is your lead
2. In field phone enter the phone number of the company's
3. Press save