VIAMI CRM

Complete Business Management Platform

Manage Sales · Projects · HR · Support · Finance

Enhance Your Business Simply

- Client portal
- Sales Pipeline
- Project Tracking
- Finance & Invoicing
- HR & Payroll
- HR & Payroll

Developed by Viami Global Services LLP • www.viami.co.in • sales@viami.co.in

VIAMI CRM

Your All-In-One Business Command Center

Developed by
Viami Global Services LLP

What is Viami CRM?

Viami CRM is a comprehensive, role-based business management platform built for modern companies. It brings together Sales, Projects, HR, Finance, Customer Support, and Client Relationship management into a single intelligent workspace — so your entire team works from one source of truth.

Role-Based Access

Admin, Staff & Client views

End-to-End Sales

Leads → Proposals → Invoices

Project Management

Tasks, timesheets & goals

HR & Payroll

Employees, leaves & salaries

Client Portal

Projects, invoices & tickets

Smart Reports

Revenue, expenses & analytics

Built for every industry that manages people, projects, and clients.

Designed for businesses of every size and industry — from startups to enterprises

01

Retail & E-Commerce

Unify B2B sales pipeline, fulfilment project tracking, inventory staff HR, and customer self-service portal

02

Construction & Infrastructure

Track site projects, resources, timelines, field staff attendance via geo-fence, and client billing in one place.

03

Manufacturing

Coordinate operations, workforce management, asset tracking, supply chain projects, and payroll seamlessly.

04

Consulting Firms

Manage client engagements, proposals, billing cycles, staff utilisation, and relationship pipelines end-to-end.

05

Healthcare Organizations

Administer staff scheduling, patient-linked projects, leave management, payroll, and client support tickets.

06

Financial Services

Track client portfolios, manage compliance projects, run staff HR, and give clients a secure document portal.

07

Startups & SMEs

Scale operations without complexity — one platform grows with you from your first hire to your hundredth client.

08

Logistics & Transportation

Coordinate fleets, field staff geo-fence check-in, delivery projects, driver assets, and customer invoicing.

Industries We Empower

Designed for businesses of every size and industry — from startups to enterprises

Construction & Infrastructure

Track projects, resources, and timelines on-site.

Logistics & Transportation

Coordinate fleets, schedules, and deliveries

Manufacturing

Coordinate operations, workforce, and supply chains

Consulting Firms

Manage engagements, billing, and client relationships.

Retail & E-Commerce

Unify sales, inventory, and customer service.

Financial Services

Track portfolios, clients, and compliance.

Startups & SMEs

Scale operations without complexity

THE ADAPTIVE DASHBOARD

Every user sees exactly what matters — personalised, intelligent, always up to date.

My Work

Todos, calendar & personal alerts

Delivery

Projects, tasks & timesheets

Support

Tickets, queues & announcements

Sales

Leads, proposals & invoices

Relationship

Customers & pipeline context

Finance

Revenue & agreement coverage

Operations

HR, settings & route oversight

Search your work, sectors, routes or modules — all from one command surface

STAFF EXPERIENCE

From Punch-In to Productivity — All in One Place.

Staff log in and immediately see their personalised workspace — their attendance, assigned projects, tasks, and notifications — all without searching.

01 **Punch In**

02 **See My Projects**

03 **Manage Tasks**

04 **Personal Todos**

05 **Get Notifications**

What Staff Can Do

Attendance & Punch-In

Location-aware check-in with geo-fence validation. Attendance auto-recorded.

My Projects & Tasks

See assigned projects, deadlines, progress. Update task status and log timesheets.

Personalised Todo List

Private to-do board for daily work items, reminders, and personal commitments.

Live Notifications

Instant bell alerts on dashboard whenever a task, project, or ticket is assigned.

Leave & Payslips

Apply for leave, track approval status, and view monthly payslip from the HR module.

Role-Based Visibility

Sales staff see sales tools, HR staff see HR — zero clutter, maximum focus.

CRM & Sales Module

From first contact to closed deal — managed in one place.

Lead Capture → Estimate Request → Proposal Sent → Negotiation → Invoice Raised → Payment Received

Customer & Contact Management

Centralised directory of customers, contacts, and key account details with full interaction history.

Proposals & Estimates

Create professional proposals, send estimates, track open/sent/draft status, and convert to invoices in one click.

Invoice & Credit Notes

Full invoice lifecycle — generate, send, track paid/unpaid/overdue, and manage credit notes and batch payments.

Lead Conversion

Capture leads, track pipeline stage, assign ownership, and seamlessly convert qualified leads to customers.

Contracts & Subscriptions

Manage recurring agreements, subscription billing, and contract renewals with automated reminders.

Sales Reports

7 tabular reports + 3 chart views covering revenue, collections, customer performance, and CI-aligned filters.

PROJECT & WORK MANAGEMENT

Track every project from kickoff to completion with full team visibility and customer-level access controls.

Task lifecycle:

Not Started → In Progress → Testing → Awaiting Feedback → Complete

Projects

Track customers, billing mode, members, start/deadline & progress in CI-style workspace.

Tasks & Kanban

Manage in list or Kanban view with priority, timers, smart filters, checklists & exports.

Timesheets

Log time per project. Integrated with task timers for accurate client billing.

Goals & Milestones

Define team goals, track milestones, and measure performance against targets.

Support Module

Keep customers happy with structured ticket management and a self-service knowledge base.

10	4	1	1	4
ALL TICKETS	OPEN	IN PROGRESS	ANSWERED	CLOSED

Ticket Management

Open, assign, track, and resolve tickets by priority, department, and status with full audit trail.

Department Routing

Route tickets to specific departments (HR, IT, Accounts) and assign to responsible staff automatically.

Knowledge Base

Build a self-service knowledge base so customers can find answers without raising tickets.

Surveys

Collect customer feedback through structured surveys linked to support interactions.

Priority & SLA Tracking

Set Low/Medium/High priorities and monitor resolution timelines to meet service agreements.

Export & Reporting

Export all ticket data and measure support performance across teams and time periods.

HR & People Management

Everything HR in one place — from onboarding to payroll, leaves to assets.

Employee Directory

Full employee records — roles, departments, contact details, geo-fence, and active/inactive status.

Assets Management

Track company assets assigned to employees — laptops, devices, equipment — with asset types.

Leave & Attendance

Configure leave types, manage requests, track holidays, and monitor attendance all in one module.

Training & Development

Record training programs and build a skilled, development-focused workforce.

Payroll & Salaries

Define salary structures, run payroll, generate payslips, and maintain compensation records.

Disciplinary Records

Maintain disciplinary action logs with structured documentation and resolution tracking.

Staff Contracts

Store, manage, and review employment contracts digitally with version control.

HR Reports

Gain insights into headcount, attendance, leave trends, and compensation analytics.

Give your customers a secure, personalised window into their business.

Your customers don't need to call or email to check on project status, invoices, or support tickets. The Viami Client Portal gives them a branded, permission-aware workspace — showing exactly what they need, when they need it.

Project Visibility

View all active & completed projects. See tasks involved, deadlines, progress percentage, and status in real time.

Invoices & Payments

Full transaction history — view, download, and track payment status for all invoices including Paid/Unpaid/Partial.

Estimates & Proposals

Review and accept commercial quotes, proposals, and estimates shared directly by the sales team.

Support Ticket Raising

Raise, track, and respond to support tickets with priority and subject. Monitor resolution progress.

Files & Documents

Access contracts, reports, shared deliverables, and other documents anytime — with direct download.

Secure & Isolated Access

Each client sees only their own data. Session-guarded with auto idle expiry and permission-aware rendering.

Role-Based Access Control

Every user gets the right access — no more, no less.

Admin

- Full access to all modules
- Manage users, roles & permissions
- View all financial data & reports
- Configure HR, payroll & operations
- Access all customer & project data
- System-level settings & configurations

Staff

- Access based on assigned role
- View assigned projects & tasks
- Log timesheets & manage own work
- Raise & respond to support tickets
- Limited financial visibility
- Department-level operations only

Client

- View their own projects only
- Access invoices & transaction history
- Raise support tickets
- View proposals & estimates
- Download shared documents
- No access to internal operations

WHY CHOOSE VIAMI CRM?

01

All-in-One Platform

Sales, projects, HR, finance, and support — no switching between tools, vendors, or spreadsheets. Everything in one URL.

02

Role-Based & Secure

Granular permission controls ensure every user — Admin, Staff, or Customer — sees exactly what they need and nothing more.

03

Client-First Design

A branded client portal gives customers 24/7 self-service access — reducing support calls and boosting client satisfaction.

04

Real-Time Insights

Adaptive dashboards and reports surface the right KPIs — revenue, tasks, HR trends — at exactly the right time for each user.

05

Scalable & Flexible

Grows with your business from startup teams to multi-department enterprises. Modules activate as you scale.

06

Live Notifications

Staff are instantly notified on task, project, and ticket assignment. No missed work, no chasing — automated alerts keep the team moving.

07

Geo-Fence Attendance

Location-based punch-in ensures field staff check in from the right place. Missing geo-fence alerts surface in the HR dashboard.

08

Expert Indian Support

Built and supported by Viami Global Pvt. Ltd., Pune — a trusted IT partner with deep understanding of Indian business operations.

VIAMI CRM

Complete Business Management Platform

Ready to Transform Your Business?

Get in touch with our team for a personalized demo
and discover how Viami CRM can work for you.

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