UC AUTOMATION SYSTEM

Fully automated Business software

Core Features

Automation

Fully automated algorithms system helps to reduce human errors, mistakes & Also saves time & money

Simplicity

Easy to learn, Easy to admit into Business process with great user interface & experience

Fully Customizable

Customize the software according to your needs, Add or hide any part of the software.

INTRODUCTION

The World is Now Divided into two Eras Pre Covid & Post Covid Era
We are now ready to take the plunge in the Post Covid era which will be a new world with new practices & a new way of Doing Business

Yes, You Heard it Right The New Way of Doing Business means adapting to the new normal & the new normal is Digitization & Automation. Businesses will only succeed if you have a Proper Digital System in Place and The Right Automation tool to Identify your daily Business Needs

We at Unicrafterz are a Young start-up with a Clear Mission to Give Business Houses their much needed Business Automation tool. The Unicrafterz Business Automation Tool at down to Earth Prices with Cart Load of features Customized & Curated for Each Business houses according to their need & preferences.
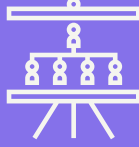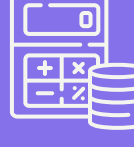
The top advantage of Using our Business Automation tool is its Simplicity - We have Built it as a very Simply & Easy to Use Mobile-friendly tool to automatize your Business so the next time you plan a trip to Goa for your leisure you don't need to worry about the direction in which your business is going - The only thing you need is a Smart Phone & an Active Internet Connection - Yes Literally only this!!

Being in the Service Industry we as a Young Entrepreneur value the Importance of After-Sale Service so keeping in Mind any query generated will be solved in less than 24 hours with a dedicated after-sales support team curated for our high-end Customer base.

FEATURES OVERVIEW

— 04

PROJECT MANAGEMENT TOOL

ONE CLICK INVOICE CREATION

CREATE ESTIMATES

CREATE PROPOSALS

LEADS MANAGEMENT

RECORD EXPENSES

RECORD PAYMENTS

AWESOME SUPPORT SYSTEM

KNOWLEDGE BASE

TASKS MANAGEMENT

MANAGE CONTRACTS

TAKE SURVEYS

COMPANY NEWSFEED

GOALS TRACKING

CUSTOM FIELDS

PERSONAL TODO LIST

DETAILED REPORTS

TIMESHEET REPORT

PROJECT MILESTONES

E-SIGNATURE

SUBSCRIPTION SYSTEM

WEB TO LEAD FORM

DETAILED CALENDAR VIEW

CUSTOMER AREA

TRACK TIMER BY MULTIPLE MEMBERS

& Many more..

DETAILED FEATURES
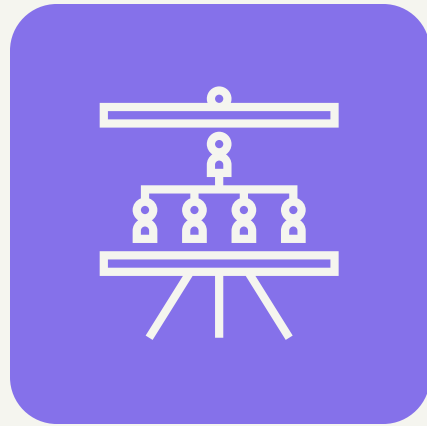
1 : Project Management Tool

Manage and invoice projects with the powerful project management feature. Track expenses and time spent on tasks and bill your customers. Ability to assign multiple staff members on task and track time logged by assigned project member.

2 : One Click Invoice Creation

Build professional and great looking invoices. Attach files and send directly to your clients including the invoice PDF. Invoice with different tax based on item. Create recurring invoices who will be regenerated automatically based on your setup for recurring invoice (every X months). You can set recurring starting from 1 month to 12 months.
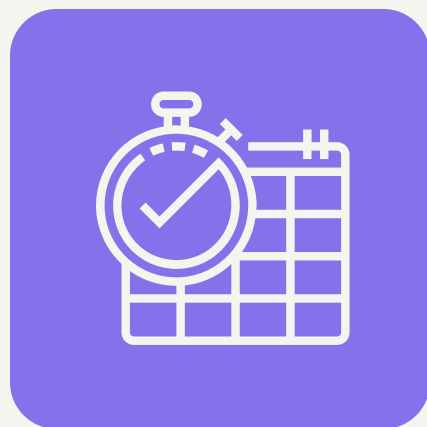
3 : Create Estimates

Create estimate within a minute. Sent to your customers and wait to accept. Ability to auto convert the estimate to invoice after customer accept. You customers can view and make actions the estimate even without login.

4 : Create Proposals

Create good looking proposals and impress your potential clients or customers. Include images, tables, youtube videos with the powerful editor. Proposals comments allowed for further discussion with the customer.

5 : Leads Management

With the simple Kan Ban you can keep track of leads and easily follow their progress. Attach files, convert lead to customer, auto import leads from email, create proposals, leave notes.

6 : Record Expenses

Record company expenses. Set up a recurring expense and the expense will automatically be created after the specified period. The period time could be days, weeks, months or years. Ability to set expenses billable to customers or projects.

7 : Record Payments

Record and receive payments in different currencies. Customers can pay you via Paypal, Instamojo, Razorpay Stripe & Others. Auto generated PDF after each recorded payment.

8 : Awesome Support System

Great support ticket system with autoresponse. Private ticket staff notes, ticket assignments, attachments, predefined ticket replies, insert knowledge base link, ticket priorities, ticket statuses.

9 : Knowledge Base

Add knowledge base articles from text editor. "Did you find this article useful?" vote included in clients area.

10 : Task Management

Assign task to multiple employees, add task followers, task comments allowed, task attachments.

11 : Manage Contracts

Use contracts feature to lock in current and feature sales. Create PDF documents in a minute and and to your customers via build-in sending contracts feature. Ability to send customer reminders before contracts expiry.

12 : Take Surveys

Create surveys and impress your customers. Add your question and improve your company productivity. Ability to send surveys to leads/customers/staff members and manualy created mail lists.

13 : Company Newsfeed

Share great company events, upload documents, easy employees communications.

14 : Goals Tracking

Setup goals and tracking achievements. Notify staff members about failure or achievement. Tracking everything.

15 : Custom Fields

Available Custom fields for most of the important features. Configure to fit your business, Ability to show in the customer portal or table. You can add custom fields input field, Number, Textarea, Select, Multi Select, Checkbox, Date Picker, Datetime Picker, Color Picker & Hyperlink to PDF invoices, estimates, Leads, Customers, Contacts, Staff, Contracts, Tasks, Expenses, items, Credit Note, Estimate, Proposal, Projects, Tickets etc.

16 : Personal Todo List

Each staff member has their own personal to do items board to increase productivity Easily change todo status by the drag and drop.

17 : Timesheet Report

Have a clear view of the time logged for each task, you can use filters to see total logged time by project and by staff member
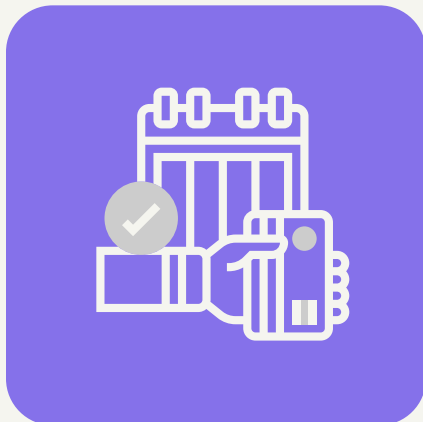
18 : Project Milestones

Create project milestones and organize your tasks for outstanding project workflow.

19 : E-Signature

E-Signature option available for contracts, proposals and estimates. Let your customers easily sign those documents and make your life easier.

20 : Subscription System

Bill your customers in a more faster way via our awesome Stripe Subscriptions, Create subscription, send the subscription to your customer and let UC Automation and Stripe do all the work behind the scenes.

21 : Web To Lead Form

UC Automation Web to Lead feature allows you to build a web form based on leads fields and custom fields to place it on your website, landing page, etc as an iframe. The visitors can then enter their names. email addresses, upload attachments and other basic information to create a lead directly in the UC Automation System.

22 : Detailed Calendar View

Have clear view of all your company events upcoming invoice payments, contracts expirations, estimates expiration, tasks finish date, reminders. You'll never miss anything from the calendar!

23 : Detailed Reports

Generate reports and have clear view of everything. Keep track of income vs. expenses and leads conversions, Knowledge base report included.

24 : Customer Area

The customers area is fully separated from the admin area. Each customer has their own portal where they can keep track of all financial data from your company.

25 : Track Timer By Multiple Members

UC Automation track timers by multiple task assignees

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Note : There are many features which are not listed in this presentation, We are continuously innovating & implementing the feature in the software.