

THE ONE-VIEW SOLUTION IS HERE AT LAST.

A CRM system for SMME's that brings you closer to the heart of your customer, eliminating wasted time and supporting you to focus on your core business.



Our customers connect with us.

**FINALLY ONE TOOL FOR EVERYTHING THAT DOESN'T COST
A FORTUNE TO IMPLEMENT AND MAINTAIN.**

SIMPLE AND EFFECTIVE IS THE BASIS OF 4LEAF.

Spend your time and energy on one tool that handles it all. 4Leaf was developed by SMME's for SMME's, so we understand the unique challenges you face including the overwhelm of solutions that can mostly be too complex and expensive.

We've included every key feature required for you, as an SMME, to effectively manage your business with confidence. This includes ticket management, project management, customer relationships and financial management.

- Proposal development
- Lead management
- Pipeline management

SALES

PROJECTS

- Task management
- Time management
- Milestones
- File sharing
- Activity logging

- Ticket logging
- Ticket management
- Automated response
- Customised priority levels

SUPPORT

FINANCIAL

- Invoices
- Statements
- Credit Notes
- Integrated payments



Our customers connect with us.

- Create proposals using standard templates that are professional
- Customise your proposals using your unique business design
- Impress your clients with proposals that can be accepted online and are downloadable
- Complete and manage your pipeline of proposals, together with quick reporting
- Separate your monthly recurring costs via a once off subscription
- Create leads and measure your conversion ratio
- Import leads from Facebook/Google or an alternative source



- A complete project management tool with Gantt view
- Monitor timesheets via mobile access for both your client and employees
- Create tasks and input milestones against projects
- Add files, notes and contracts associated with each project
- Create discussions specific to milestones
- Create and manage tickets related to each project
- Monitor activity on every project for better control
- Invoice milestones as each project progresses
- Clients can view their projects via mobile or desktop
- Customise what each client is able to view

CONNECTING YOU TO YOUR CUSTOMERS.

- Create tickets using customised status priorities and unique auto responses
- Get an instant dashboard view of all tickets via mobile and the web
- Add tags to tickets and assign tickets to relevant employees to complete
- Customise ticket replies and automate updates sent to clients
- Client can create tickets via the web or their mobile
- Add attachments to tickets
- View weekly status updates on tickets
- Export reports in CSV, Excel or PDF
- Set reminders for escalation
- Set tasks and allocate to the relevant employee to complete

- Create invoices with ease and efficiency
- Integrated payment gateways for instant payment
- Dashboard view of invoices sent, paid and outstanding
- Create expenses associated to each project
- Get access to a payments dashboard
- Get access to a credit notes dashboard
- Set up and manage once-off and recurring costs

*Simplicity.
Satisfaction.
Success.*

The 4Leaf offering is agile and can be customised to your unique requirements. The majority of the customisation can also be completed without intervention from any service provider.

The tool is accessible on both web and mobile for your ease of use. For this reason, 4Leaf places a firm focus on the protection of your information ensuring all data is centrally stored.