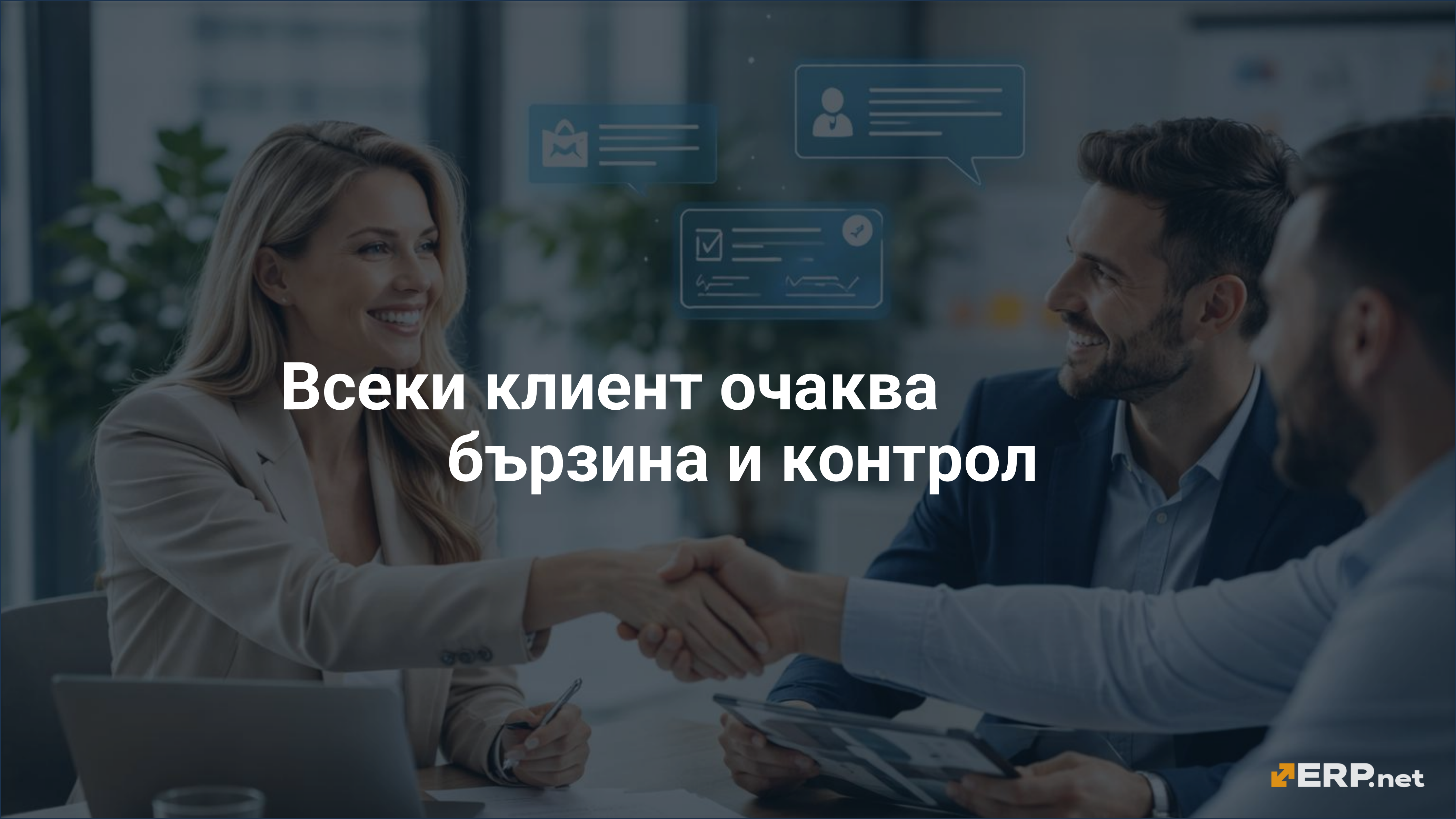


ERP.net Express CRM V26.2



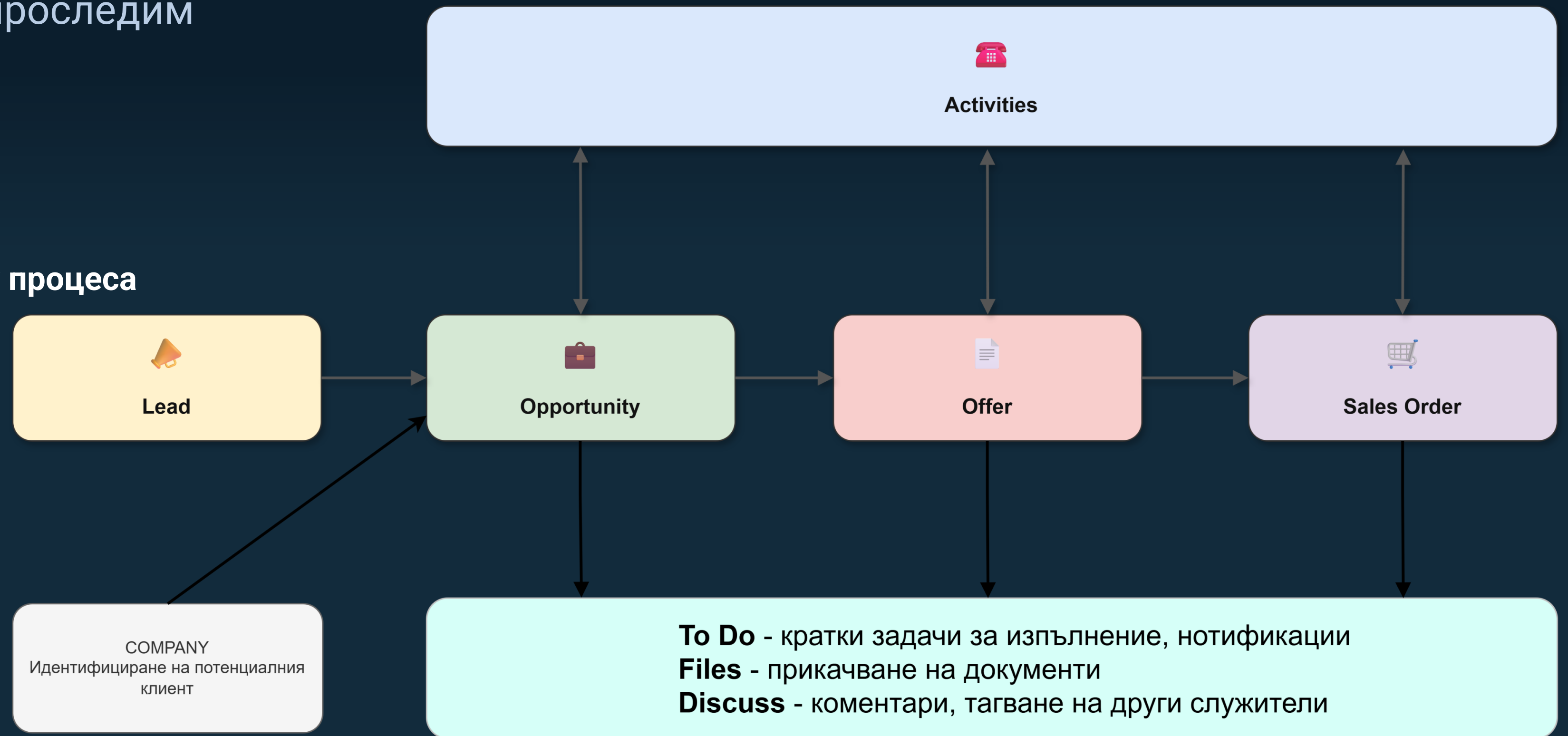
A professional business meeting scene with three people shaking hands. The image is overlaid with a semi-transparent blue filter. Three floating icons are visible: a mail icon, a person profile icon, and a checklist icon with a graph.

**Всеки клиент очаква
бързина и контрол**

Lead-to-Order process

Целият път от интерес до поръчка е структуриран и проследим

- ✓ Ясни етапи
- ✓ Проследимост
- ✓ Контрол върху процеса



Customer management

Цялата информация за клиенти и контакти е централизирана и лесно достъпна

- ✓ Единен профил на клиента
- ✓ История на взаимодействията
- ✓ Бърз достъп до информация

ERP Bulgaria Ltd.

Company

COMPANY ADVANCED

Name: ERP Bulgaria

City: Sofia City

Responsible Person Name: Ivan Argentinski

Registration Type: Ltd.

Registration Number: 121084091

Is Active: Yes

Registration Primary Address: 11 Gen. Stoletov Blvd., entr. B, fl. 1, 1309 Sofia, Bulgaria

Is VAT Registered: Yes

Country: Bulgaria

Registration VAT Number: BG121084091

NOTES

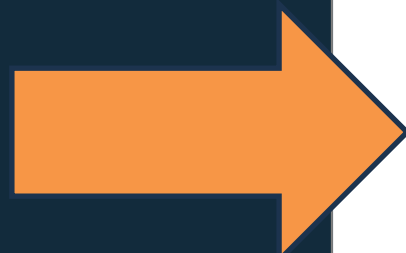
CONTACT MECHANISMS

	No	Type	Contact Details	Notes	Is Active	Is Default
CLIENT AGREEMENT						
EMPLOYEES						
DEPARTMENTS						
RELATIONSHIPS	1	Address	гр. София, бул. "Г. Столетов"№11		<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> False
OPPORTUNITIES	2	E-mail	mail@aloeco.com		<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> False
ORDERS	3	Telephone	029515939	Централа	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> False
ACTIVITIES	4	Telephone	024390196		<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> False
MESSAGES						
CASES	5	Telephone	070045105	Телефон поддръжка	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> False

Customer management

Цялата информация за клиенти и контакти е централизирана и лесно достъпна

- ✓ Единен профил на клиента
- ✓ История на взаимодействията
- ✓ Бърз достъп до информация



ERP Bulgaria Ltd.

Company

COMPANY ADVANCED

Name
ERP Bulgaria

Registration Type
Ltd.

Registration Primary Address
11 Gen. Stoilev Blvd., entr. B, fl. 1, 1309 Sofia

Country
Bulgaria

NOTES ▾

CONTACT MECHANISMS 8

- CLIENT AGREEMENT
- EMPLOYEES
- DEPARTMENTS
- RELATIONSHIPS
- OPPORTUNITIES
- ORDERS
- ACTIVITIES
- MESSAGES
- CASES

CONTACT MECHANISMS

CLIENT AGREEMENT

EMPLOYEES

DEPARTMENTS

RELATIONSHIPS

OPPORTUNITIES

ORDERS

ACTIVITIES

MESSAGES

CASES

BANK ACCOUNTS

Edit Actions Share No follow

Responsible Person Name
an Argentiniski

Active
Yes

Is Active Is Default

	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> False
	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> False
нтрапа	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> False
елефон поддръжка	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> False

Communication tracking

Цялата комуникация с клиента се съхранява и проследява на едно място

- ✓ **Имейли**
- ✓ **Обаждания**
- ✓ **История на комуникацията**

The screenshot displays a CRM interface for 'Omega WMS Ltd.'. The top navigation bar includes 'Contacts / Party Communications / 7422cc2b-4bee-4bdb-81fd-1eac363c7e37: 71276601-3b2f-4228-b0b2-0067aeab2737 / Omega WMS Ltd.'. The main header shows 'Omega WMS Ltd.' with a 'Company' label and action icons (Edit, Actions, Share, No follow, etc.).

The 'COMPANY' section contains the following details:

- Party Name: Omega WMS Ltd. (highlighted with a red box)
- Registration Number: 1234567890
- Country: Bulgaria
- Party Code: 00041
- Is VAT Registered: No
- City: Sofia
- Party Type: Company
- Registration VAT Number: BG123456789
- Notes: (empty)

The 'PARTY COMMUNICATIONS' section (highlighted with a red box) shows a table of communication events:

Time Occurred At	Direction	From	To	Channel	Sub Channel	Subject	Message
2026-03-18 15:54	Inbound	office	n.mihaylova@...	Note	Internal	Замяна на продукт	Направена замяна на продукт в поръч...
2026-03-18 10:00	Inbound	office@errrp.bg	n.mihaylova@...	Email	Outlook	Корекция на продукти в ...	Здравейте, Налага се да направим зам...
2026-03-17 16:00	Outbound	n.mihaylova@...	h.kostadinov@...	Email	Outlook	RE: Оферта лицензи ERP...	Здравей, Христо. Ще разгледам оферт...
2026-03-17 00:00	Inbound	0888123456789	0888987654321	IM	Viber		Пратката е околпектована. Днес я пуск...
2026-03-16 00:00	Inbound	h.kostadinov@...	n.mihaylova@...	Email	Outlook	Оферта лицензи ERP.net ...	Здравей, Нина. Изпращам ти офертата...

Lead automation

Лидовете се създават автоматично от входяща комуникация

From: ivan.ivanov@ddsoft.bg
Sent: Thursday, March 19, 2026 11:59 AM
To: info@erp.net info@erp.net
Subject: [ERP.net](#) - Contact Form by DD Soft Ltd.

Dear Sir or Madam,

I am contacting you regarding the selection of a subscription-based ERP/CRM system with a Bulgarian-language interface for the management of logistics, transport, warehousing, relocation, and loading/unloading services. Our main requirement is that the system should allow individual services to be set up as separate items with unit prices, which can then be combined into one overall quotation, with the system automatically calculating the final price for the client. We are looking for a solution that covers the following core processes: receiving and processing client inquiries preparing and sending quotations automatic calculation of combined services order and task management planning and allocation of resources execution tracking reporting and analytics |

Best regards

Ivan Ivanov
Logistics Manager
Phone: [+359899107525](tel:+359899107525)

The screenshot displays a CRM interface for creating a new lead. At the top, there is a search bar and navigation icons. Below the search bar, the breadcrumb path is "/ Presales / Leads /". The main heading is "New Lead". A progress bar shows the workflow stages: "New" (active), "Qualifying", "Marketing Qualified", and "Sales Qualified". The form is divided into two main sections: "PERSON" and "COMPANY".

PERSON Section:

- Salutation
- First Name
- Last Name
- Role In Company
- Person Email
- Person Mobile Phone

COMPANY Section:

- Company Name
- Industry
- Company Size
- Solution
- Sales Area
- Notes

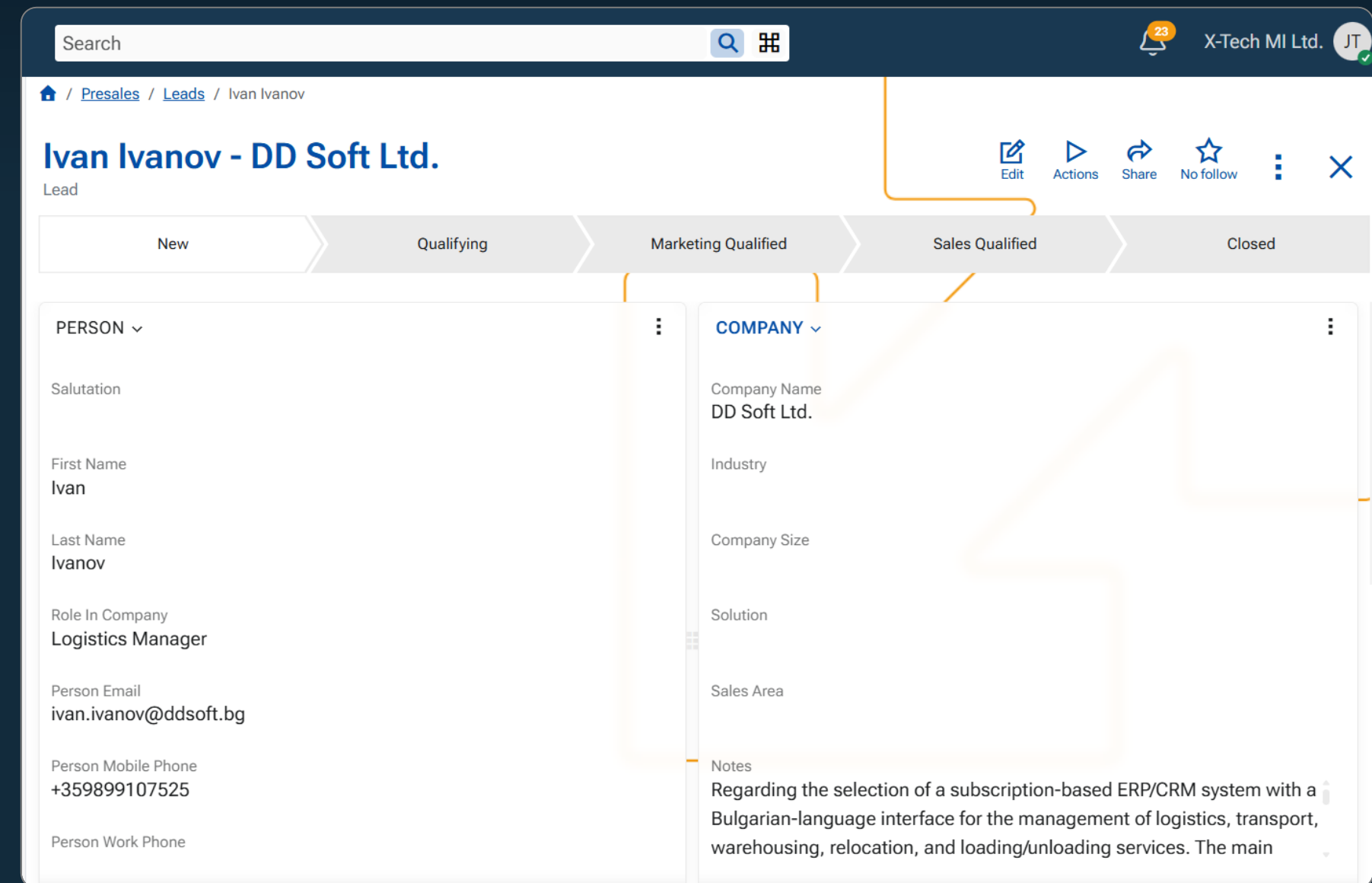
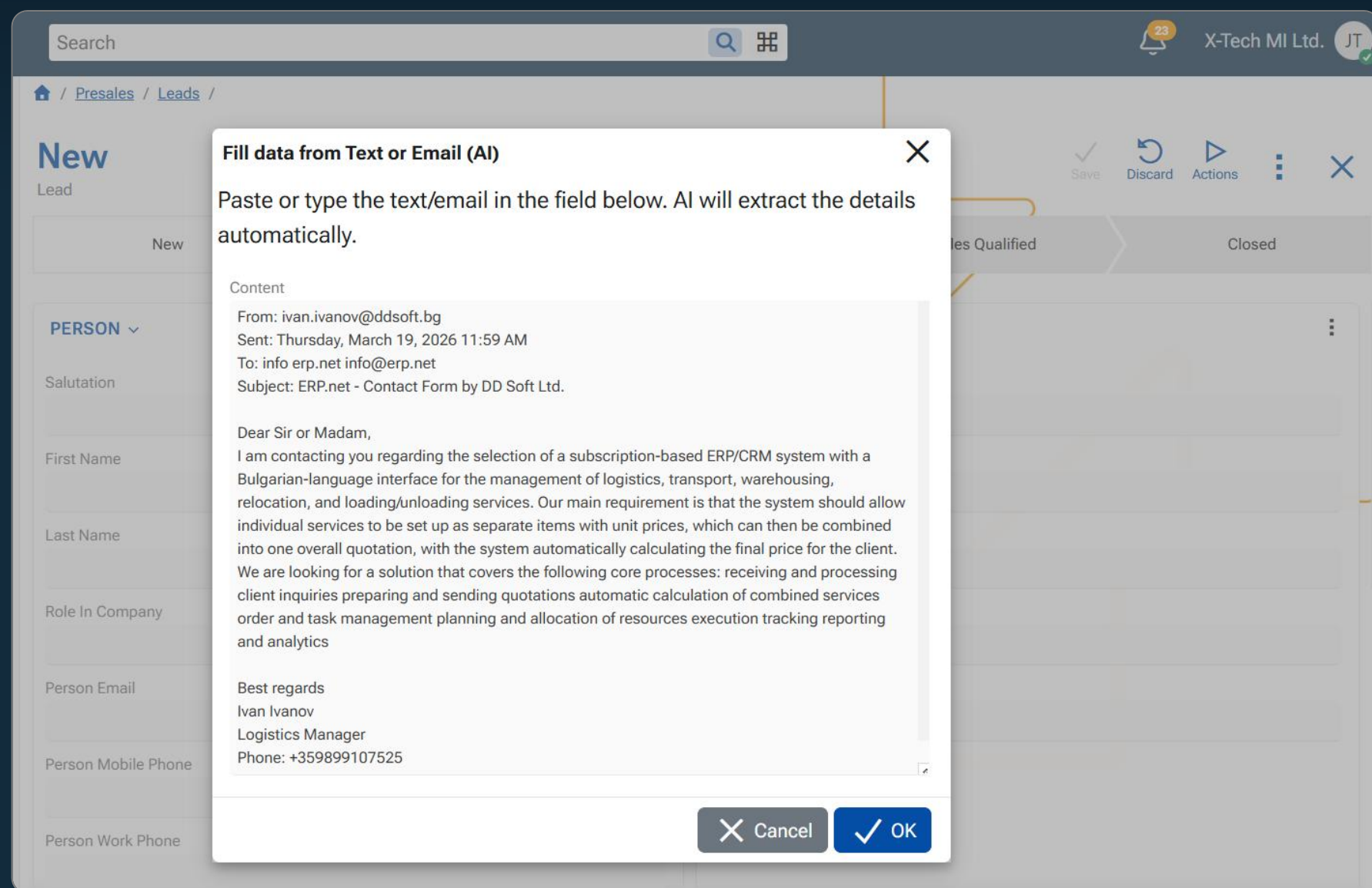
On the right side of the form, there is a menu with the following actions:

- Fill data from Text or Email (AI)
- Assign default sales person
- Create opportunity
- Create copy

At the top right of the form, there are buttons for "Save", "Discard", "Actions", and a close button (X).

Lead automation

Лидовете се създават автоматично от входяща комуникация



Lead to opportunity

Потенциалните клиенти се превръщат в реални възможности без загуба на информация

The screenshot displays a CRM interface for a lead named Ivan Ivanov at DD Soft Ltd. The lead is currently in the 'Marketing Qualified' stage of a process that includes 'New', 'Qualifying', 'Marketing Qualified', and 'Sales Qualified'. The lead's details are as follows:

PERSON	COMPANY
Salutation	Company Name DD Soft Ltd.
First Name Ivan	Industry
Last Name Ivanov	Company Size
Role In Company Logistics Manager	Solution
Person Email ivan.ivanov@ddsoft.bg	Sales Area
Person Mobile Phone +359899107525	Notes Regarding the selection of a subscription-based ERP/CRM system with a Bulgarian-language interface for the management of logistics, transport, warehousing, relocation, and loading/unloading services. The main
Person Work Phone	

An 'Actions' menu is open over the lead record, showing the following options:

- Fill data from Text or Email (AI)
- Assign default sales person
- Create opportunity
- Create copy

Lead to opportunity

Потенциалните клиенти се превръщат в реални възможности без загуба на информация

The screenshot displays a CRM interface with two main panels. The left panel shows a lead profile for Ivan Ivanov at DD Soft Ltd., with fields for personal and contact information. The right panel shows an opportunity record for DD Soft Ltd. - Opportunity 00031, with a progress bar indicating stages from New to Closed. A 'DISCUSS' chat window is open on the right, showing a message from Sophia Fletcher. A yellow arrow points to the 'Notifications' icon in the top right of the opportunity view.

Lead Profile: Ivan Ivanov - DD Soft Ltd.

Lead

PERSON ▾

Salutation

First Name
Ivan

Last Name
Ivanov

Role In Company
Logistics Manager

Person Email
ivan.ivanov@ddsoft.bg

Person Mobile Phone
+359899107525

Person Work Phone

Opportunity: DD Soft Ltd. - Opportunity 00031

Deal

New Firm planned Released Completed Closed

DEAL ▾

Date
2026-03-19

Party
DD Soft Ltd.

Expected Revenue
2,000.00

Expected Revenue Currency
EUR

Success Probability
75.00%

LINES ▾ 2

Line number	Product	Quantity	Quantity Unit	Notes
10	Event Photography Services	1.000	pcs	

DISCUSS

07:56 PM (a minute ago)

Имат интерес към нашите услуги. Ще им изпратим нашето портфолио за Събитийна фотография и ще се чуем след седмица.

Sophia Fletcher Моля да им изпратиш портфолиото

Type a new message...

Lead to opportunity

Потенциалните клиенти се превръщат в реални възможности без загуба на информация

The image displays three overlapping screenshots of a CRM system interface, illustrating the transition from a lead to an opportunity.

- Left Screenshot:** Shows a lead record for "Ivan Ivanov - DD Soft Ltd." with a status of "Lead". The "Qualifying" stage is highlighted. Personal details include: Salutation, First Name (Ivan), Last Name (Ivanov), Role In Company (Logistics Manager), Person Email (ivan.ivanov@ddsoft.bg), and Person Mobile Phone (+359899107525).
- Middle Screenshot:** Shows an opportunity record for "DD Soft Ltd. - Opportunity 00031" with a status of "Deal". The "Firm planned" stage is highlighted. Deal details include: Date (2026-03-19), Party (DD Soft Ltd.), Expected Revenue (2,000.00), Expected Revenue Currency (EUR), and Success Probability (75.00%).
- Right Screenshot:** Shows the same opportunity record, but with an "Actions" menu open. The "Create Offer" option is highlighted. Other actions include: Assign default sales person, Create copy, Change type, and Void document. A notification for "Изпращане портфолио" (Portfolio sending) is visible, scheduled for tomorrow.

Sales process

Продажбеният процес е структуриран и дава пълен контрол върху всяка сделка

Search

X-Tech MI Ltd. JT

Home / Sales / Orders / Sales Order 00023

Sales Order 00023

Sales Order

New Firm planned Released Completed Closed

SALES ORDER

Date: 2026-03-19

Document No: 00023

Customer: DD Soft Ltd.

Currency: EUR

Assigned To User

LINES 2

Product	Quantity	Unit	Unit Price	Standar Discour	Custor Discour	
Event Photography Servi...	1.000	pcs	5,000.00	0.00%	0.00%	5,000

DOCUMENT FLOW

- Opportunity 00031
- Offer 00029
- Sales Order 00023**

Sales Order 00023

Firm planned
2026-03-19

Creation User: admin
Creation Time: 2026-03-19 20:32
Release Time:
Subtask



DOCUMENT FLOW

- Opportunity 00031
- Offer 00029
- Sales Order 00023**

Sales Order 00023

Firm planned
2026-03-19

Open

Creation User: admin
Creation Time: 2026-03-19 20:32
Release Time:

ERP.net Express platform

CRM и ERP работят заедно в една платформа без
нужда от интеграции

The screenshot displays the ERP.net Express platform interface. The top navigation bar includes a search bar, a notification bell with 6 alerts, and the user profile for 'X-Tech MI Ltd.' with initials 'JT'. The left sidebar contains a navigation menu with sections: Overview, Notifications, Menu (Role: X-Tech MI Role), Leads, Opportunities (Potential deals), Offers, Offers - Lines, Leads - User Stages, and Recent. The main content area shows a breadcrumb trail: Presales / Opportunities / NESTLE BALGARIYa EAD - Opportunity 0000000016. The title is 'NESTLE BALGARIYa EAD - Opportunity 0000000016' with a 'Deal' label. A progress bar indicates stages: New, Firm planned, Released, Completed, and Closed. The 'Completed' stage is highlighted. Below the progress bar, the 'DEAL' section shows details: Document Type (Opportunity), Document Date (2025-09-11), Document No (0000000016), Campaign (Digital Marketing Lead Generation), Leading Sales Person (John Miller), Party (NESTLE BALGARIYa EAD), and Expected Revenue (0.00). On the right, a 'DISCUSS' panel shows a message from 'ERP.NET' dated 9/11/2025, 03:27 PM. The message text is: 'Получихме запитване от Нестле България. Кай-голямата компания, производител на храни и напитки в света'. Below the text are two attachments: a table with columns for 'Period' and 'Revenue' for years 2020, 2024, and 2025, and a bar chart titled 'Opportunity 0016'. The bottom of the discussion panel has a text input field 'Type a new message...' and a send button.

ERP.net Express platform

CRM и ERP работят заедно в една платформа без
нужда от интеграции

The screenshot displays the ERP.net Express platform interface. On the left is a sidebar menu with sections: Overview, Notifications, Menu (Role: X-Tech MI Role), Leads, Opportunities, Offers, Offers - Lines, Leads - User Stages, and Recent. The main area shows a calendar for March 2026, with various events scheduled. The calendar is titled 'Calendar' and includes navigation for '2026 March' and 'Calendar - Month'. The events are as follows:

Day	Event
March 23 (Mon)	10:30 Weekly Pipeline Review
March 24 (Tue)	10:30 New prospect outreach, 13:30 Sales-Marketing align
March 25 (Wed)	13:30 Sales-Marketing align
March 26 (Thu)	10:30 Lead qualification call, 15:30 ICP & segmentation w, 14:30 Partner enablement d
March 27 (Fri)	10:30 Customer relationship, 11:00 Training - Running dis
March 28 (Sat)	Jacob Turner on leave
March 29 (Sun)	
March 30 (Mon)	13:30 Sales-Marketing align, 15:30 Q1 Commercial Review
March 31 (Tue)	

ERP.net Express platform

CRM и ERP работят заедно в една платформа без
нужда от интеграции

The image displays three overlapping screenshots of the ERP.net Express platform interface, demonstrating its integrated CRM and ERP capabilities.

Left Screenshot (Presales Dashboard): Shows the 'Presales' overview with a navigation menu on the left. The menu includes 'Overview', 'Notifications', 'Menu', 'Leads', 'Opportunities', 'Offers', and 'Recent'. The main area displays a list of deals, including 'NESTLE BALGARIYa EAD - Opport...' and 'Monty's Trade Ltd. - Opportunity 00...'. The ERP.net logo and version 'v.26.2.2.2' are visible at the bottom.

Middle Screenshot (Calendar): Shows a calendar view for '2026 March'. The calendar displays events for various weeks (BW9 to BW14) across Monday and Tuesday. Key events include '10:30 New prospect', '10:30 Weekly Pipeline Review', and '13:30 Sales-Marketin'.

Right Screenshot (Chat): Shows a chat window titled 'General Conversations'. The chat history includes messages from Daniel Edwards (DE) and Sophia Fletcher (SF). Daniel Edwards sends a greeting and mentions creating to-dos. Sophia Fletcher responds, mentioning a notification and a training course. Daniel Edwards then mentions uploading safety instructions. The chat interface includes a search bar, navigation icons (Chat, Calendar, To Do, Cases, Files, Members, Meet), and a message input field at the bottom.

ERP.net Express platform

The image illustrates a workflow in the ERP.net Express platform through four sequential screenshots:

- TO-DOS:** A task list with three items: "Подготовка портфолио" (due tomorrow), "Подготовка и изпращане оферта" (due after tomorrow), and "Обаждане за коментар на портфолиото и офертата" (due 2026-03-27).
- DISCUSS:** A chat interface showing a message from Sophia Fletcher requesting a portfolio and photo for an event, and a response from Michael Reeds offering assistance with documents.
- FILES:** A gallery of files including "CommunicationLog Exapl...", "Offer.docs.png", "Portfolio_2.png", and "Portfolio.png".
- Functions:** A context menu with actions such as "Tagged", "Share", "Copy Link", "Share to group", "To Data Exchange", "Add to folder", "Print", "Form", "Delete", and "Changes history".

Orange arrows indicate the flow from the to-do list to the discussion, then to the files, and finally to the functions menu.

Calendars & activities

Потенциалните клиенти се превръщат в реални възможности без загуба на информация

The screenshot shows a web-based calendar interface for June 2025. The interface includes a search bar, navigation buttons for the current month, and a 'Create' button. The calendar grid shows the following activities:

Week	Mon	Tue	Wed	Thu	Fri	Sat	Sun
BW18	28	29	30	1	2	3	4
BW19	5	6	7	8	9	10	11
BW20	12	13	14	15	16	17	18
BW21	19	20	21	22	23	24	25
BW22	26	27	28	29	30	31	1

Activities for the week of June 14-16:

- June 14: 15:30 Demonstration to prospective
- June 15: 15:00 Motorsports Event Photoshoot, 15:00 Product Placement Photoshoot
- June 16: 12:00 Event Photoshoot

Calendars & activities

Потенциалните клиенти се превръщат в реални възможности без загуба на информация

Calendar interface for X-Tech MI Ltd. showing a monthly view for June 2025. The calendar displays days from Monday to Sunday, with a search bar and navigation controls. A single activity is visible on June 14th at 15:30.

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
BW18	28	29	30				
BW19	5	6	7				
BW20	12	13	14				
BW21	19	20	21				
BW22	26	27	28				

Calendar interface for Lagerta Ltd. showing a weekly view for March 2026. The calendar displays days from Monday to Sunday, with a search bar, navigation controls, and a 'Create' button. Multiple activities are visible across the week.

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
BW9	23	24	25	26	27	28	1
BW10	2	3	4	5	6	7	8
BW11	9	10	11	12	13	14	15
BW12	16	17	18	19	20	21	22
BW13	23	24	25	26	27	28	29
BW14	30	31	1	2	3	4	5

Activities shown:

- 10:30 Lead qualification call (Thu 26)
- 10:30 Customer relationship (Fri 27)
- 10:30 New prospect outreach (Tue 10)
- 15:30 ICP & segmentation w (Thu 12)
- 10:30 Weekly Pipeline Review (Mon 16)
- 10:30 New prospect outreach (Tue 17)
- 13:30 Sales-Marketing align (Wed 18)
- 14:30 Partner enablement d (Thu 19)
- 10:30 Competitive positionir (Fri 20)
- 11:00 Training - Running dis (Fri 20)
- Jacob Turner on leave (Fri 20 - Sat 21)
- 13:30 Sales-Marketing align (Mon 1)
- 15:30 Q1 Commercial Review (Tue 2)

**Try Out The Platform
Express CRM**



**Try Out The Platform
ERP.net**

