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INTRODUCTION TO KIT19

WATCH THIS VIDEO TO GET A BRIEF INTRODUCTION TO KIT19



Note: If this video doesn't open, you can watch it here: https://www.youtube.com/watch?v=UTXcyhrl-mg&ab_channel=Kit19

MODULES

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AUTO LEAD CAPTURING

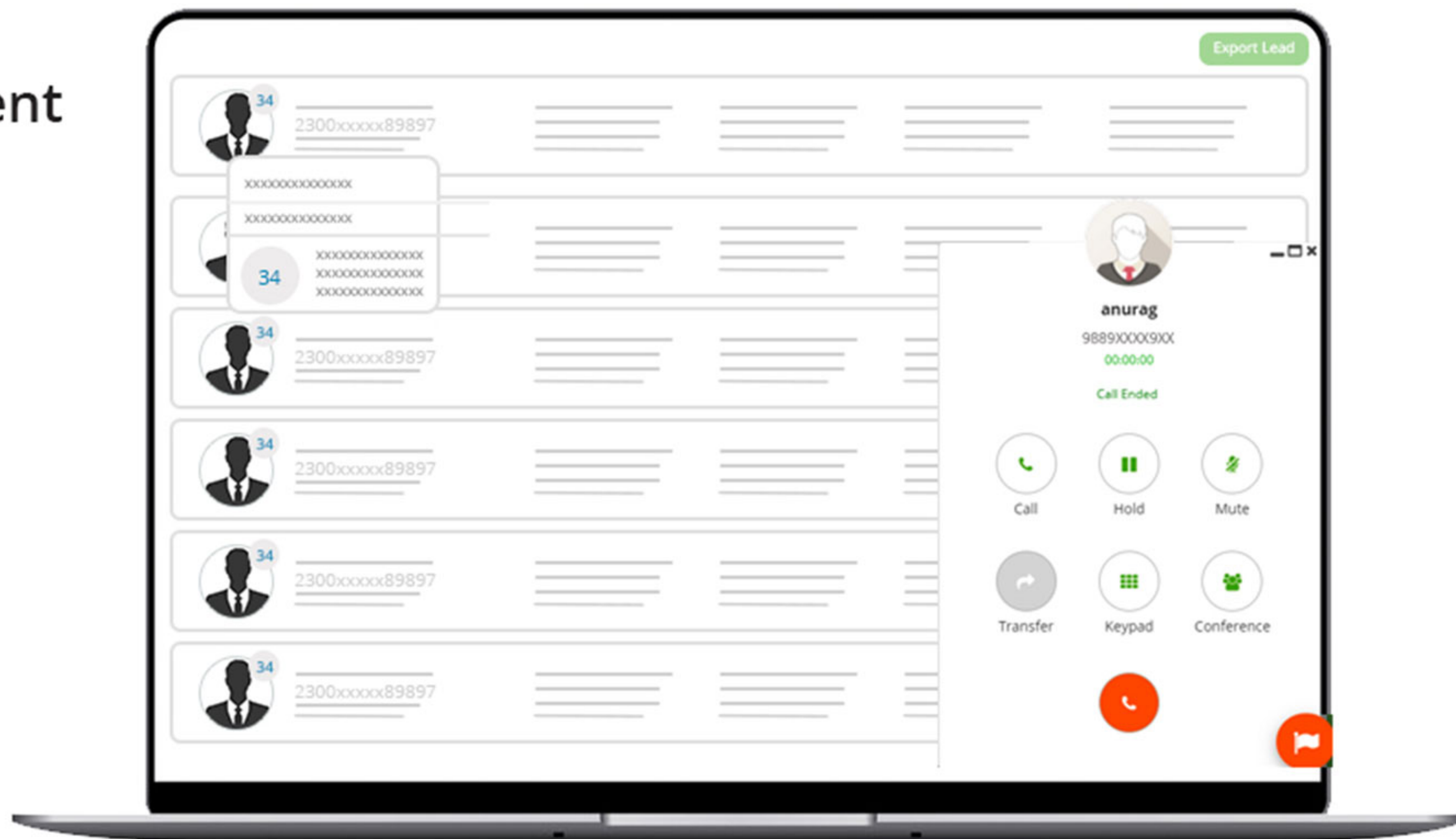
- ✓ B2B Integration
- ✓ Mail to Lead
- ✓ Social Media Integration
- ✓ API's
- ✓ Webform to Lead
- ✓ Call to Lead
- ✓ Google Integration



Kit19

ENQUIRY / LEAD MANAGEMENT

- ✓ Enquiry / Lead management
- ✓ Create customized Fields
- ✓ Click to Call / SMS / Mail / Whatsapp
- ✓ Auto Assign Lead
- ✓ Lead Enrichment
- ✓ Lead Activity
- ✓ Lead Scoring
- ✓ Hidden Fields / Masking to mask lead's confidential information



PIPELINE MANAGEMENT

- ✓ Create customized pipelines & stages
- ✓ Visual Pipeline to drag and drop leads across stages
- ✓ View Estimated revenue each month
- ✓ Track lead's progress towards stages
- ✓ Filter leads based on expiry dates, closure dates, sales executive etc



SALES GOALS



- ✓ Define sales goals based on Conversions / Invoices / Pipeline
- ✓ Assign sales targets to user/ team
- ✓ Track users' / Teams' progress on given targets
- ✓ Define multiple targets based on revenue / no. of closures etc
- ✓ Filter goals based on currency, pipeline stages or products

Field force management

- ✓ Real Time Location tracking
- ✓ Shifts/ Roaster / Attendance/ Leave management
- ✓ Rules to manage any kind of field agents
- ✓ Appointment management
- ✓ Expense Claim Management
- ✓ Custom forms for check-in/sign in
- ✓ Custom compliance rules, warnings, actions
- ✓ Check-in / geofence / compliance breach alerts
- ✓ Geo verified sign in / meetings
- ✓ Team Collaboration/Comments for meetings



CLOUD TELEPHONY

- ✓ Customer IVR Flows
- ✓ Real Time Personalization in Voice
- ✓ Multilingual Voice Support
- ✓ Call to Ticket
- ✓ Call to Lead
- ✓ Virtual Call Center
- ✓ SMS Integration
- ✓ API's
- ✓ Voice Broadcast





QUOTATIONS, INVOICES, PAYMENTS & LEDGER

- ✓ Create/Clone/Print/Download Quotations, Invoices & Payment receipts in seconds
- ✓ Set reminders/notifications for due quotations/invoices
- ✓ Share via SMS, Mail, Whatsapp
- ✓ Customize themes, Labels, notes, everything!
- ✓ Convert Quotations to Invoice in one click
- ✓ Accept online payments
- ✓ Supports Multiple branches
- ✓ GST Compliant
- ✓ Track all history including Customer actions of viewing/accepting/requesting revision
- ✓ View / Print Customer ledger

KIT19 AI TOOL

Do you struggle for good content everytime you want to send an attractive mailer or a message to your customers? Or when you want to write a contract or a formal legal agreement but the lawyer asks for a handsome amount? Or may be when you just want to write a warning letter to your employee ? Or maybe an article for digital marketing?

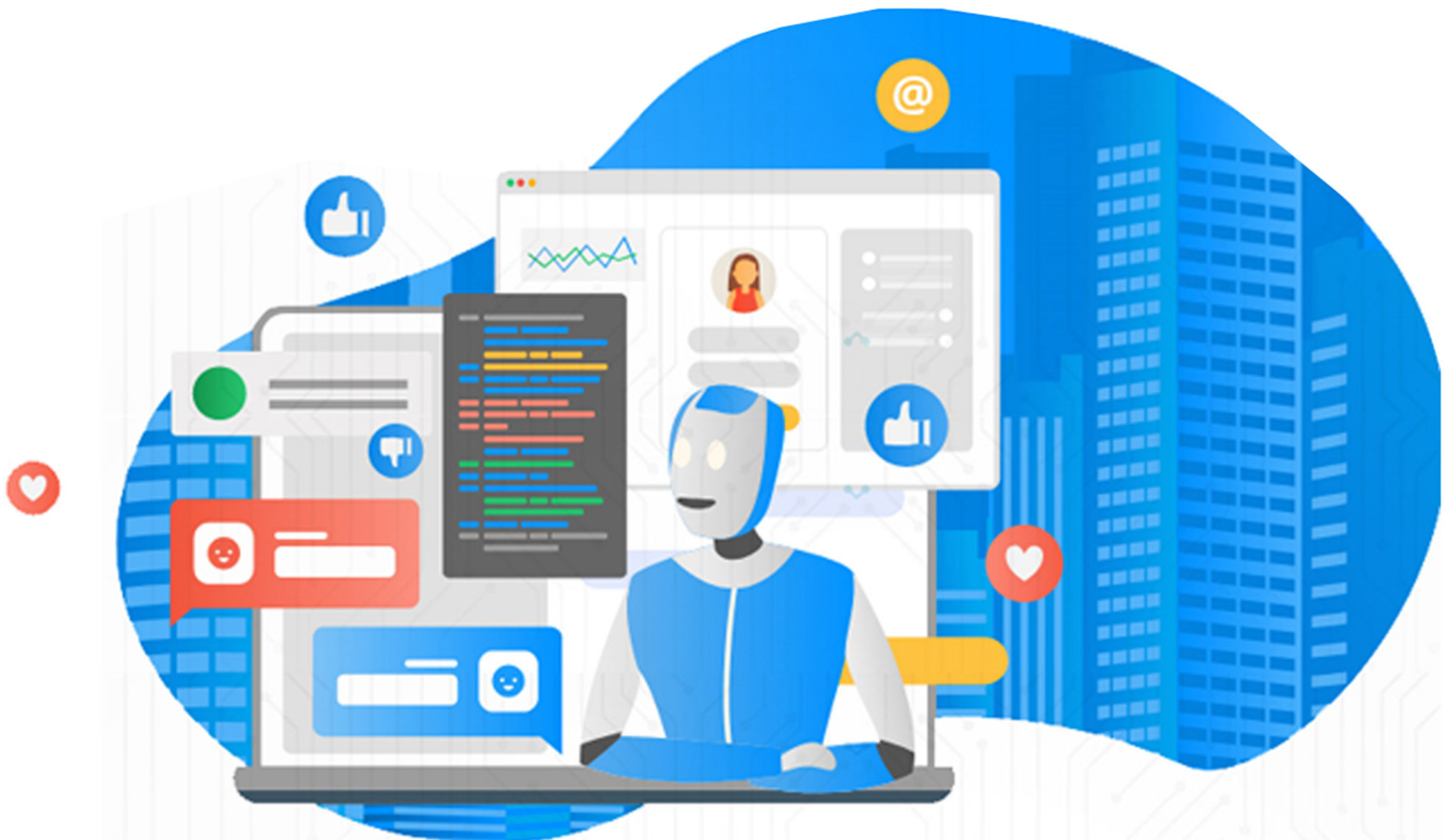
If you find yourselves in these situations, then this tool is here to ease you of many worries. Creative connect for digital marketing or formal agreement, Mathematical calculations or even language translations, this tool will answer your questions and even entertain you with funny jokes.

Grammar correction, summarizing or detailing , this tool can do just about everything, if it has to do something with words.

With its super easy interface, you can use the predefined templates or create any custom scenario that fits your needs. Featuring 4 levels of AI advancement, it is capable of carrying out simple operations and solving complex algorithms alike. And it is definitely your go-to thing if you want results fast.

Say goodbye to your content writer who charges you hefty and delivers in a day.

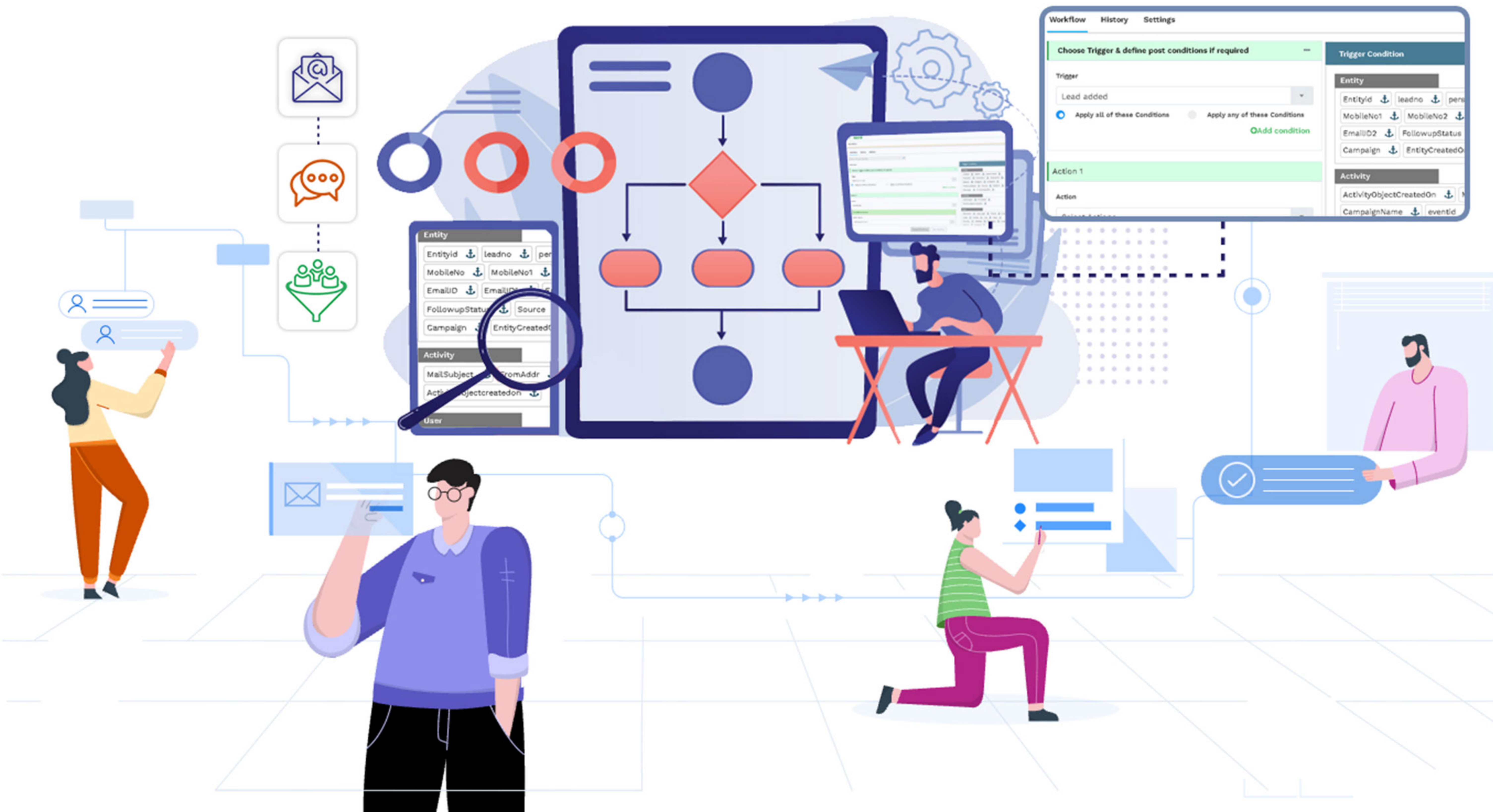
Use Kit19 AI tool and get your job done in a jiff at a fraction of what you pay.



WORKFLOW

Workflows are a set of operations that you follow to achieve a particular objective. These operations can be time critical and required to be followed in the same order in order to get the desired results. Often these processes require an involvement of more than one person or departments to work in sync which becomes difficult in real life scenario and makes them prone to failure. This leads to chaos, productivity loss and wrong business decisions.

Automating repetitive workflows makes them more reliable and measurable. Kit19's visual drag and drop workflows make it easy for you to build multi step workflows and review their results for making better decisions. Being able to use the results from the previous steps in all subsequent steps and condition based execution of the steps takes away the pain of remembering & logging all outcomes manually. With over 100 triggered CRM events or a customized schedule to invoke your workflows, & actions comprising custom webhooks, you just have to one more thing to do: **Saying goodbye to chaos while the workflows do their stuff**



MOBILE APP

- ✓ Track Field Staff
- ✓ Lead Management
- ✓ All Call Tracking
- ✓ Notification
- ✓ Track field staff's location
- ✓ Set on field/off field to enable/disable tracking
- ✓ Get real time location reports
- ✓ Get historic location reports





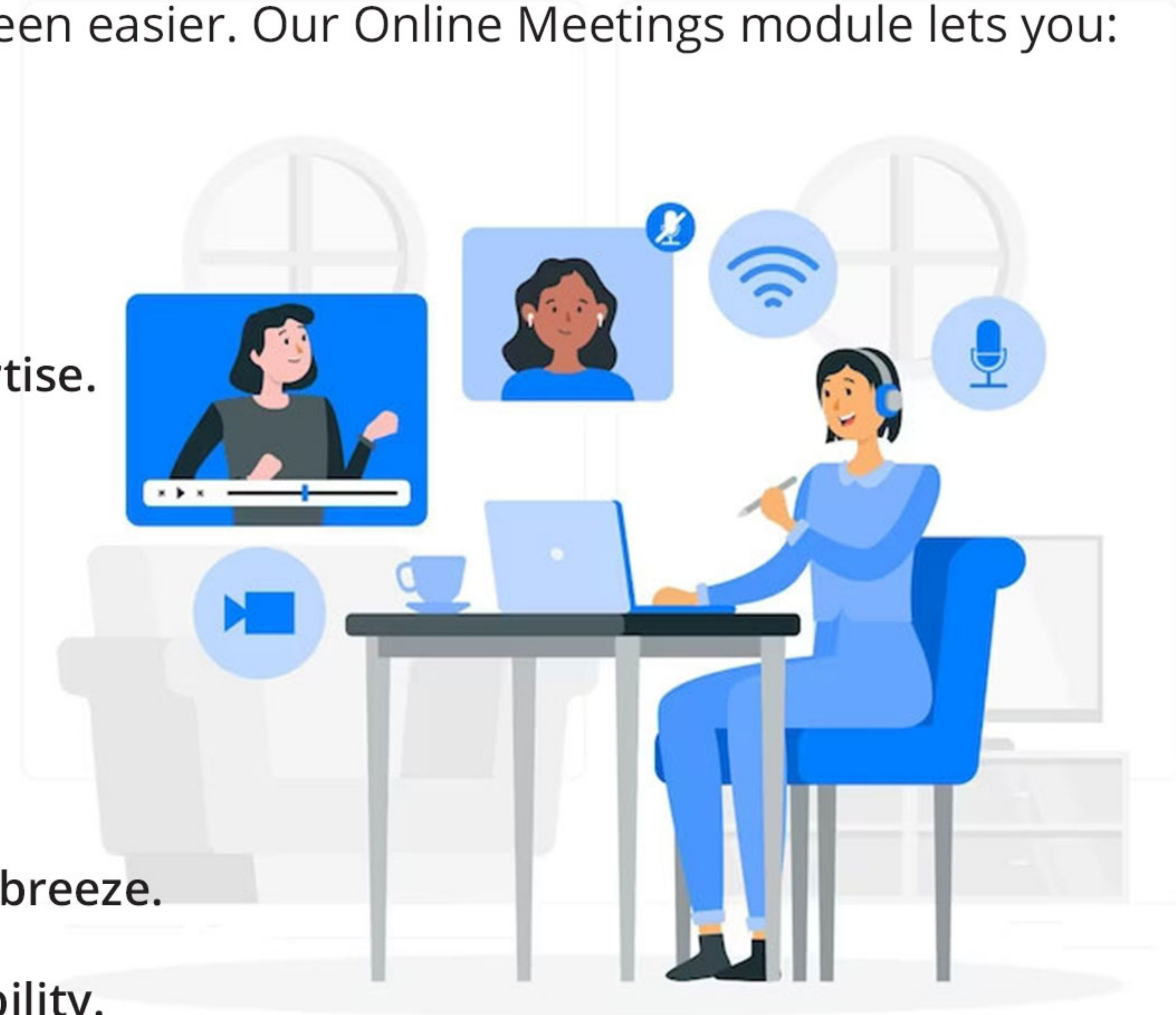
TICKET MANAGEMENT

- ✓ Custom Support Portal
- ✓ Multilingual Support
- ✓ Mail to Ticket
- ✓ Call to Ticket
- ✓ Webform to Ticket
- ✓ Customized Feedbacks
- ✓ Ticket Dispatch Automation
- ✓ Event Based Notification
- ✓ Custom SLA
- ✓ Custom Roles
- ✓ Detailed Report

ONLINE MEETINGS THAT DEFINE CONVENIENCE

Welcome to a whole new level of lead management! With Kit19's latest feature, conducting online meetings with your leads and enquiries has never been easier. Our Online Meetings module lets you:

- ✓ Seamlessly organize one-on-one meetings with your prospects.
- ✓ Host engaging webinars to showcase your expertise.
- ✓ Collaborate with your clients effortlessly.
- ✓ Record meetings for future reference.
- ✓ Chat, take notes, and share screens/documents during the meetings.
- ✓ Set up recurring meetings, making scheduling a breeze.
- ✓ Create public webinars to boost your brand visibility.
- ✓ Customize registration forms for a personalized experience.
- ✓ Restrict participants based on your criteria.

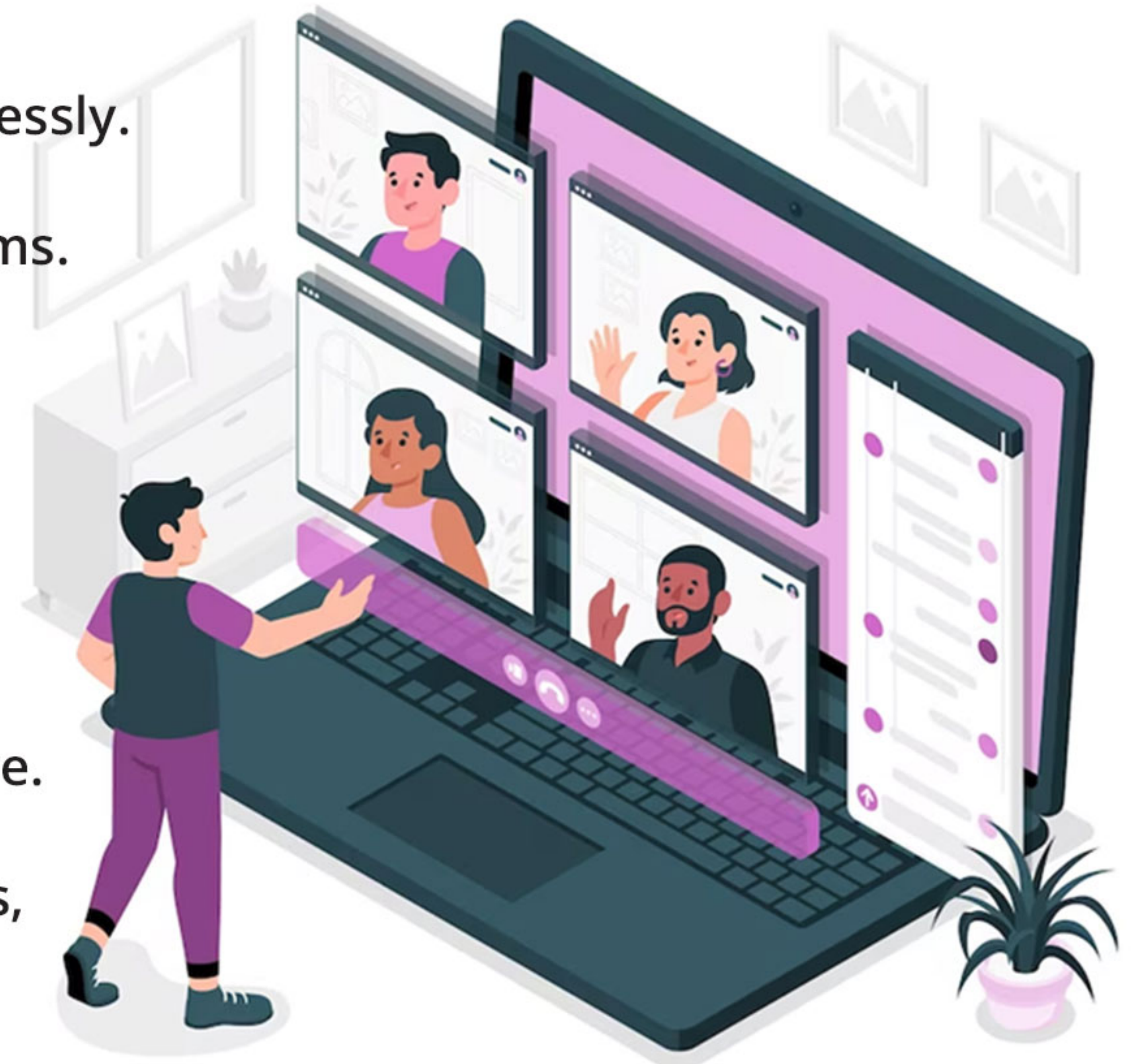


Unlock the power of virtual engagement and take your lead management game to a whole new level with Kit19!

ELEVATE COLLABORATION WITH TEAM CHAT

Introducing the Enterprise Collaboration Module you've been waiting for – Team Chat by Kit19. This feature empowers your team's communication and collaboration in ways you've never imagined:

- ✓ Chat, voice call, and video call with your colleagues effortlessly.
- ✓ Create dynamic groups for Branches, Territories, and Teams.
- ✓ Conduct group chats, calls, and video meetings.
- ✓ Reach your entire team with one-to-many broadcasts.
- ✓ Have full control over user permissions.
- ✓ Share documents, contacts, location, audio, videos, & more.
- ✓ Seamlessly exchange leads, inquiries, tasks, appointments, and events.
- ✓ Access call and video recordings for a comprehensive overview.
- ✓ Automate repetitive tasks and event reminders with bots.
- ✓ Create public groups to broadcast company announcements.



Break down communication barriers and boost productivity with Team Chat – your new secret weapon for successful lead management!

DOCS LIBRARY: YOUR CRM'S NEW BEST FRIEND

We understand the struggle of digging through desktops and the inconvenience of being away from your files when you need them most. That's why we've introduced the Docs Library in Kit19, your CRM's new best friend:



- ✓ Store files, documents, and resources right within Kit19.
- ✓ Access your catalogs, presentations, price lists, logos, and more from anywhere, anytime.
- ✓ Seamlessly integrate these files into your Kit19 CRM workflow.
- ✓ Eliminate the need for constant back-and-forth between your desktop and CRM.
- ✓ Stay productive, even when you're on the go.

Say goodbye to file-hunting frustrations and welcome an organized, efficient workflow with Kit19 Storage. Your files, your way!

ESHOP

- ✓ Predefined Eshop Template
- ✓ Product Variants Customisation
- ✓ Pre Integrated Online Payment
- ✓ Multi Currency Support
- ✓ Multilingual Support on Pages
- ✓ Customized Product Views
- ✓ Customized Discount Coupons
- ✓ Product Video Support
- ✓ Event Tracking & Notification
- ✓ Loyalty Program
- ✓ Personalized pages
- ✓ Vendor Management
- ✓ Stock & Inventory Management
- ✓ Manual Order Punching





WEBFORM

- ✓ Embed web form
- ✓ Use as Pop-up
- ✓ Drag & Drop Web Forms
- ✓ Predifened Templates
- ✓ Web form to Ticket
- ✓ Web Form to Order
- ✓ Personalized Web Form
- ✓ Web Form Tracking
- ✓ SMS / Mail / Voice Integration
- ✓ Host on Self Domain

- ✓ Drag & Drop Landing Pages
- ✓ Predefined Templates
- ✓ SMS / Mail / Voice Integration
- ✓ Personalized Landing Page
- ✓ Landing Page Tracking
- ✓ SMS / Mail / Voice Integration
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- ✓ Host on Self Domain

CAMPAIGN

- ✓ Event Triggered Campaigns
- ✓ Scheduled Campaign
- ✓ SMS / Mail / Voice Campaigns
- ✓ Advance Campaigns
- ✓ Group Based Campaigns
- ✓ Google Adwords Campaign





PRIVATE SHORT URL

- ✓ Unlimited Visit
- ✓ Used In SMS Tracking
- ✓ API's
- ✓ Dynamic Destination URL
- ✓ Customer Domains
- ✓ SSL Certification

SMS / MAIL

- ✓ Personalisation
- ✓ Scheduling
- ✓ Pre - defined Templates
- ✓ Tracking
- ✓ API's
- ✓ Flash / Unicode
- ✓ SMS to WhatsApp
- ✓ SMS to Mail
- ✓ SMS to Call
- ✓ SMS with Insta Connect





SOCIAL MEDIA INTEGRATION

- ✓ Integrate facebook pages and facebook forms with Kit19
- ✓ Capture all digital and social media leads through web forms
- ✓ Auto lead capturing
- ✓ Auto lead creation and assignment
- ✓ Triggered SMS/Mail/Connect to agent campaigns on lead creation
- ✓ Integration link with Facebook
- ✓ Integration link with Youtube
- ✓ Integration link with Twitter
- ✓ Integration link with Instagram

TASK & APPOINTMENT MANAGEMENT

- ✓ Customized Followup
- ✓ Assign a Task to Individual
- ✓ Assign a Task to Group
- ✓ Assign Meeting to Individual
- ✓ Assign a Meeting to Group
- ✓ Track Result of Each Task
- ✓ Track Result of Each Appointment



CONTROL ACCESS AND ACTIVITIES WITH ROLES

- ✓ Use predefined roles or create custom roles for your staff
- ✓ Hierarchy allows to control access of records
- ✓ Permissions to allow / disallow almost all activities
- ✓ Granular control over each entity and activity
- ✓ Visual drag and drop hierarchy
- ✓ Audit user's activity (coming soon)





DIGITAL IDENTITY

- ✓ A Beautiful, Dynamic Page
- ✓ Complete Profile on Internet
- ✓ Used for Entire Marketing Everywhere
- ✓ Used or Adding New Customer

WHATSAPP INTEGRATION

- ✓ Connect with over 2 billion users worldwide on their favourite platform
- ✓ Integrate Whatsapp business API
- ✓ Import contacts
- ✓ Send and receive free chat messages during Customer Care window
- ✓ Create multilingual templates
- ✓ Send Notifications messages outside customer care window
- ✓ Multi user support
- ✓ Automated replies
- ✓ Automated lead/enquiry mapping
- ✓ Automated Lead creation and assignment
- ✓ Send auto prompts to users to extend customer care window
- ✓ Create auto chat at various lead activities like conversions, task completion, ticket creation/resolution etc
- ✓ Bulk messaging broadcast
- ✓ Chatbot integration (Coming soon)



WHATSAPP AUTOMATION

- ✓ Create automation rules based on user details / message
- ✓ Reply via text, image, doc, video, snippet or template on Whatsapp
- ✓ Create and run a sequence of activities when a user initiates chat
- ✓ Send SMS / Mail / Voice / Run webhook
- ✓ Capture user's input in lead details



Whatsapp Commerce

You can now sell your products/services on whatsapp using this feature. If you are using Whatsapp business platform, your customers are already communicating to you through this channel. You can leverage this engagement further by creating your catalogue that your users can view and shop from.



Whatsapp commerce is gaining huge popularity among whatsapp users since it is easy to use and doesn't require logging in besides providing smooth and faster checkouts.

At Kit19, you have an added advantage of uploading your Kit19 products on Whatsapp directly. You can view your orders, set up payment methods and even automate checkout (coming soon). This automation allows you to set flows for cart submission, abandonment and order processing

Chatbots

Chatbots are a new and innovative way to communicate with your customers. By using chatbots, businesses can automate their customer service and keep their customers updated on their latest products and services. WhatsApp chatbots can also be used to promote your brand and build customer loyalty.



With Kit19's chatbot, apart from the basic automation, you can perform Kit19 specific tasks as well. The chatbot allows you to create follow ups, tasks, appointments, move pipeline stages, Send SMS, Mail, Voice, run a webhook, update a lead and notify your users etc.

These chatbots can be invoked using the automation rules so you can invoke different chatbots based on the customer who is chatting or based on their inputs. You can even use these chatbots on your website to assist your customers



Social Media Marketing

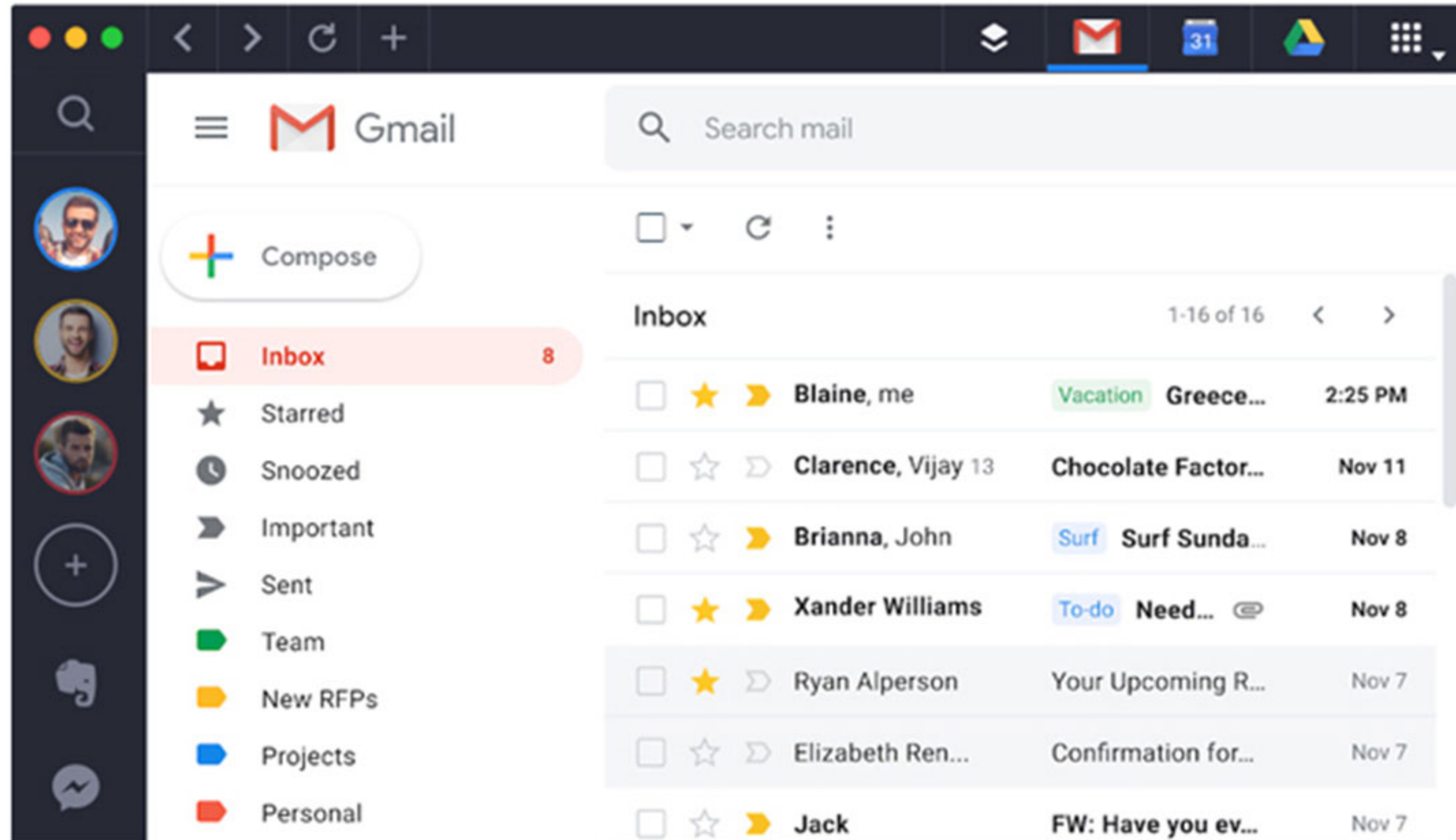
Have you given up advertising with Google or facebook because it was too confusing or may be because you didn't get desired results? Or did you try advertising on these platforms through an agency and ended up paying hefty amount just for ad set up and maintenance.

Even if you managed to master getting leads through these platforms, shuffling between them is no joke either.

Trust us, we've been there too and that's the reason we came up with this feature of Digital Marketing on these platforms right from Kit19. While doing so, we took at most care to simplify things so you won't face the challenges that deter you from harnessing these powerful platforms.

We know that ad success largely depends on 3 things, the audience you choose, the content you create and of course, your product. Using Kit19's digital marketing feature, you don't have to worry about the first two. Further, the process of creating ad is made so simple that even a novice can create high performing ads.

With pre-created audience for almost all industries and automated content creation for your creative's, Kit19 masters the art of churning out facebook and google campaigns that deliver.



EMAIL INTEGRATION

- ✓ Integrate your mails with Kit19
- ✓ Send and receive mails from your id to your enquiries/leads
- ✓ Automated lead/enquiry mapping
- ✓ Automated Lead creation and assignment
- ✓ Track each mail open
- ✓ Track each link open in mail
- ✓ Unlimited rich text templates
- ✓ Personalize mails with leads' details
- ✓ Perform actions like creating tasks/appointments/tickets or sending mail for parsin

GOOGLE CALENDAR



- ✓ Integrate google calendar with Kit19
- Auto plot tasks/appointments
- ✓ Auto Invite to collaborators for tasks/appointments
- ✓ Get calendar alerts when tasks/appointments are due
- ✓ Get notified when tasks are edited/deleted/completed

STAFF TIME TRACKER

- ✓ Monitor your employees from anywhere
- ✓ Automated tracking for remote/ distributed teams
- ✓ Track Apps, URLs & Offline Time
- ✓ Capture auto screenshots of employees' screens
- ✓ Offline tracking
- ✓ Shift scheduling
- ✓ Get employee attendance
- ✓ Be notified if a user goes on a long break
- ✓ Be notified if a user logs in late
- ✓ Be notified if a user works less than required
- ✓ No more time wastage by employees
- ✓ Customize unproductive apps & know how long employees spent on these apps



Kit19

OUR CLIENTS



HOW KIT19 WORKS

HOW KIT19 WORKS

Now that you know how **Kit19** can increase your Sales, Better your **Customer Service** and **Track your Employees**, Why not get a sneak peak into all its modules.



SOLUTION: DRIP CAMPAIGNS

If you are looking for genuine leads for your business, then do try Kit19's AI automation to filter out cold leads with 3 time more precision. See your sales sky rocket while your sales people thank you for this step.

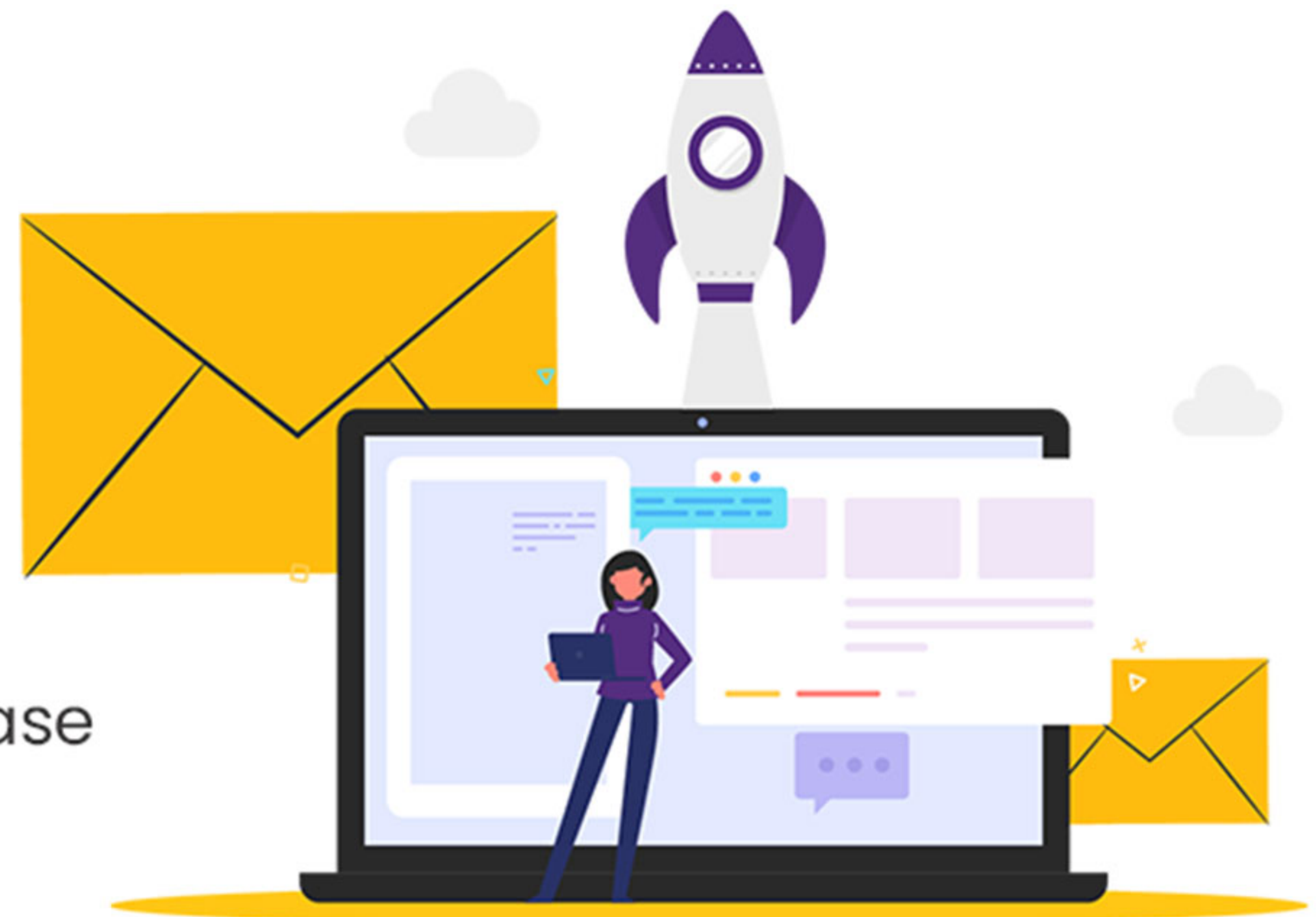
One of the most powerful tools in a marketer's toolbox is the drip campaign. Even though planning a marketing campaign with a high success rate may be hard, its execution need not be. Kit19 eases this pain of marketers so they can concentrate on strategizing instead of worrying over its implementation.

Drip campaigns can automate the process of sending out targeted messages to prospects and customers, making the job of a marketer much easier. They can help to increase brand awareness, build customer loyalty and drive sales. They can also help to improve customer satisfaction and reduce customer churn. Drip campaigns can be used to target new customers, as well as existing customers. They can be used to promote new products or services, as well as upsell and cross-sell existing products and services. Drip campaigns can be highly personalized, which can help to increase conversion rates.



SOLUTION: DRIP CAMPAIGNS

Drip campaigns can be used to send out a variety of messages, including SMS messages, emails, WhatsApp messages, and even voice calls. Each type of message has its own benefits, and when used together, they can create a powerful marketing campaign that can help to increase sales and conversions.



A drip campaign is a multi step process that can be used for various purposes like filtering out cold leads, keeping your customers engaged or simply following up on leads. At Kit19, we call it marketing sequences.

SOLUTION: DRIP CAMPAIGNS

A marketing sequence can be triggered on more than 200 events and activities that are either performed on or by your enquiries/ leads. Here we are providing a few examples which fit almost all businesses' need.

NEW ENQUIRY FLOW //

- ✓ New enquiry is added
- ✓ An sms/email is sent with the current offer and a link to explore details
- ✓ The enquiry clicks on the link
- ✓ An automated voice call is triggered after 2 minutes of when the enquiry clicks the link. The voice prompts the user to indicate his interest by providing an input
- ✓ The enquiries that expressed their interest are immediately sent a Whatsapp message.
- ✓ When the enquiry replies to the message, a lead is generated automatically and the chatbot starts interacting with the lead.
- ✓ The newly created lead is transferred to the lead follow up campaign where it is nurtured till closure

SOLUTION: DRIP CAMPAIGNS

LEAD FOLLOWUP FLOW //

- ✓ Followup is added to a lead
- ✓ Depending on the type of follow up, an email and a SMS is triggered with the optionsto indicate if the lead is **Interested in demo** or **Not interested**.
- ✓ If the lead selects **Interested in demo** option, a WhatsApp is sent to the lead asking for a demonstration date and time.
- ✓ When the lead provides the date and time, an appointment is marked in the system andthe appointment owner inthe internal team is notified along with the lead.
- ✓ As soon as the time approaches for that demonstration, an automated call is initiated which connects appointment owner with the client.
- ✓ Once the demo /appointment is completed or mark closed by the appointment owner, once again an email is triggered sharing all the features and the offers about the product again confirming the lead's interest.
- ✓ When the lead confirms interest in the product, a quotation is sent to the lead over WhatsApp and the lead is added to pipeline on stage **Quotation shared**.
- ✓ Alternatively, if the lead clicks on **Not interested**, a task is added in the system and it is assigned to the senior person in the team to revive the lead and the same cycle is repeated.

SOLUTION: DRIP CAMPAIGNS

NOT FOLLOWED LEAD //

- ✓ We create a segment where we the clients should not been touch for the last one month and not interested clients are club together
- ✓ Now an automatic campaign is run via email on first of every month, which has a link of a special offer for such leads.
- ✓ Once they show interest in that offer, an SMS for pertaining that offer is sent to those leads.
- ✓ Once the lead clicks on the SMS link to view product details & offers, an automatic voice is sent to them to confirm their interest.
- ✓ The leads confirming interest over the call are sent a WhatsApp for specifications.
- ✓ When the lead provides those, the internal staff is notified so he could follow the lead.

GETTING STARTED WITH KIT19

This document walks you through the onboarding steps that are followed once you subscribe to Kit19. Since there are newer features and modules being added to the software continuously, there may be new steps that are added

USER SET UP

- ✓ User Creation so users can use the CRM too.
- ✓ Create organization chart to let Kit19 know the hierarchy
- ✓ Create and assign roles, customize rights & privileges, create teams for users.

TOOL SET UP

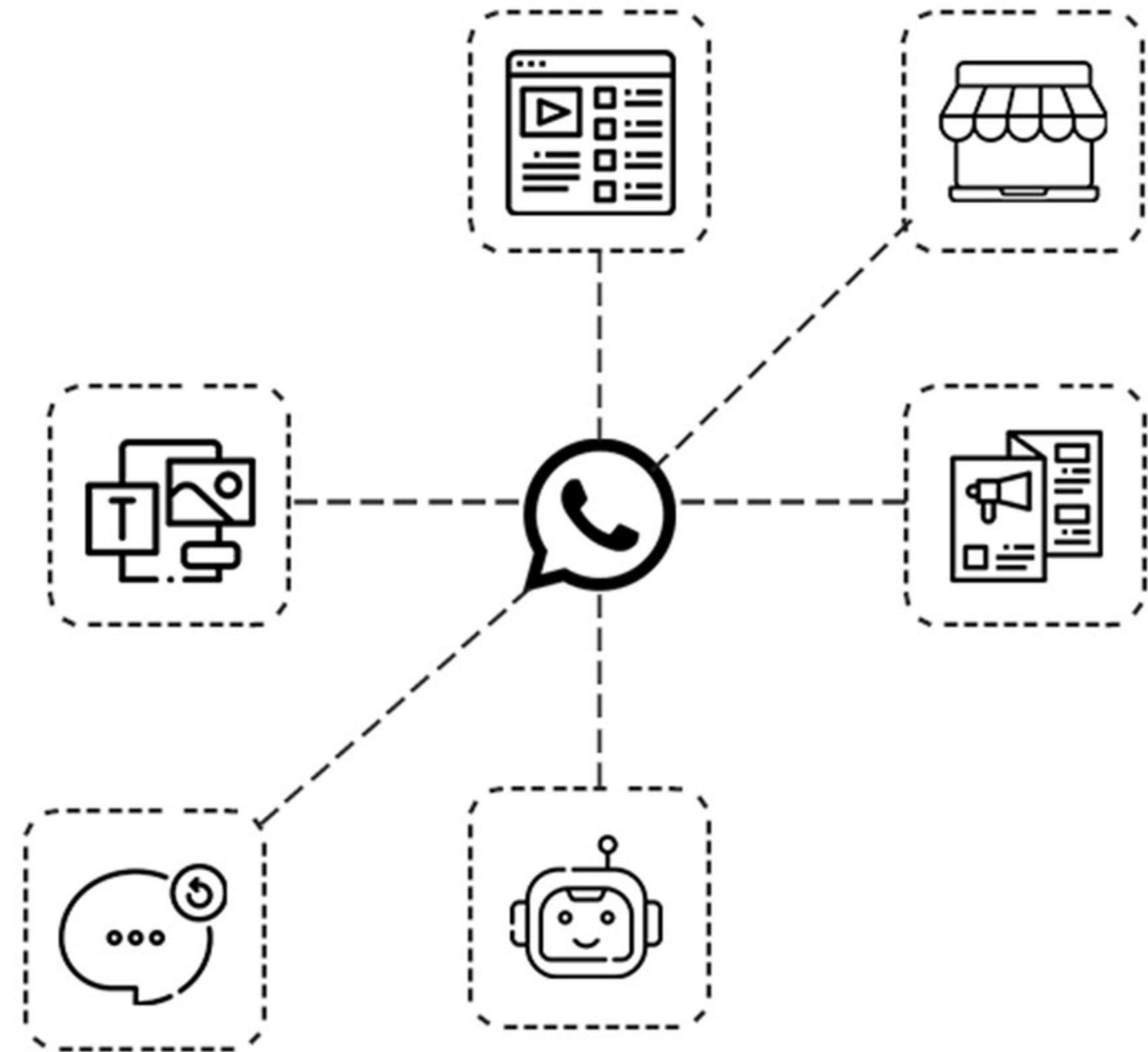
- ✓ Create landing pages to capture leads and web forms for feedback, surveys etc
- ✓ Create call flows for inbound, outbound calls.
- ✓ Set up DLT details for SMS, From Email id for mails.
- ✓ Create Email templates
- ✓ Request tracking in SMS if you plan to track links opened in SMS
- ✓ Set up your Eshop



GETTING STARTED WITH KIT19

WHATSAPP SET UP

- ✓ Set up Whatsapp Business settings
- ✓ Set up auto reply settings and defaults
- ✓ Create Whatsapp templates
- ✓ Set up whatsapp catalogue to have your customers buy directly from within whatsapp
- ✓ Set up your chat bot



ENQUIRY/LEAD SET UP

- ✓ Create all customized fields for enquiries and leads as per your requirement.
- ✓ Create customized source, medium, campaign settings as required
- ✓ Set up auto lead Capturing from all portals Of B2B platforms and also Facebook,
- ✓ Google, Email, Website, Tawk to and other sources.
- ✓ Import historical enquiry and lead data.
- ✓ Create enquiry/lead Segments based on your requirement

GETTING STARTED WITH KIT19

SALES ACTIVITIES SET UP

- ✓ Create customized follow-up as required
- ✓ Set up auto lead distribution rules
- ✓ Set up pipeline and stages as per your business needs
- ✓ Set up customized option for tasks and appointments as required.
- ✓ Customize quotation and invoice settings as per requirement
- ✓ Create call settings for Click to call option
- ✓ Create notification alert settings at required events for agents.
- ✓ Create triggered alerts or marketing sequences (drip campaigns) for enquiries/ leads at various events and execution stages (mainly on lead added, follow-up added, appointment added, task added etc)
- ✓ Install mobile app on your production staff's mobiles
- ✓ Install employee time tracking on your staff's desktops
- ✓ Integrate all users' email IDs to their panel so they can check emails too.
- ✓ Set up lead Scoring rules
- ✓ Set up Sales Targets for Sales Agents
- ✓ Set up workflows to automate repetitive tasks.

GETTING STARTED WITH KIT19

SERVICE TICKET MANAGEMENT SET UP

- ✓ Setup your ticket portal for Service management
- ✓ Set up ticket auto distribution rules
- ✓ Set up response and resolution SLAs
- ✓ Customize notification settings as per your requirement

REPORTS

- ✓ Set up BI reports as per your requirement
- ✓ Setup automated reports on mails as per requirement

With the above steps done, your users can continue to use Kit19 for their daily operations smoothly. The platform provides for an easy-to-use interface that makes setting up quick. Apart from this, many predefined options so many of the above steps can be skipped in the beginning and taken up when need be.

CONTACT US

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