IN PLAIN WORDS

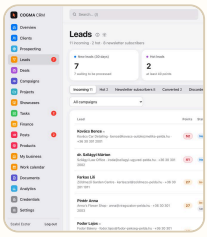
How COGMA CRM works

A CRM is your business's shared memory: for every enquiry, client, quote, task and invoice, one place shows what has happened and what comes next. On top of that, COGMA CRM **reminds you, keeps watch and prepares things** – the decisions are always yours.

A client's journey – in five steps

1 Someone gets in touch

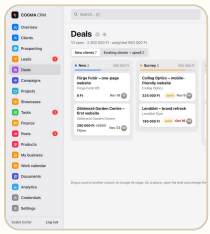
They fill in your website form, sign up for your newsletter or call you.



The CRM: adds them to Leads and scores how interested they are.

2 It becomes a deal

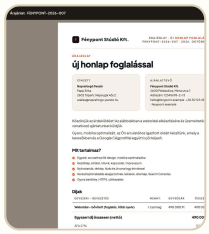
One click turns the enquiry into a client and a deal.



The CRM: shows where it stands on the board and warns you if it stalls.

3 You send a quote

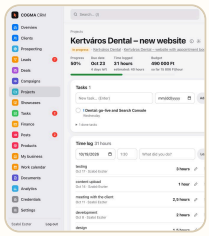
From a template in a minute – as a link or a QR code.



The CRM: when they open it, you get a task: call them now.

4 They accept

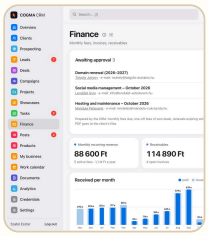
The client accepts on their phone – no signing, no scanning.



The CRM: marks the deal won; the project starts with one click.

5 You invoice

Invoices that are due are prepared and wait for your approval.



The CRM: Számlázz.hu issues them; payments are tracked.

What happens in the background – for you

- **A summary at 7 am** in your inbox: today's tasks, overdue deadlines, invoices awaiting approval.
- **It watches your website visits**: when a known lead comes back and looks at prices, their score goes up.
- **It prepares monthly fees** and upcoming renewals – no surprises at the end of the month.
- **Deadlines show up in your phone's calendar** too, via a subscribable calendar link.
- **It tells you when a deal goes quiet** or has no next step – before it's forgotten.
- **It keeps score per campaign:** what it cost, how many leads and how much revenue it brought.
- **It monitors domains and websites**: expiry, availability, security certificate.
- **It backs up**: the database lives on your own hosting and downloads with one click.

What it doesn't do – on purpose

It doesn't send anything or issue an invoice without your approval, it doesn't read your mailbox, and it doesn't post for you. It prepares, reminds and calculates – but you decide.

WHY IT SAVES TIME

You don't work more – you search and forget less

In most small businesses it isn't the work that's slow – it's what surrounds it: finding out what happened, remembering who to call, typing things twice. The CRM takes that off your plate.

1. Nothing to keep in your head

BEFORE Sticky notes, phone reminders, "I'll call them tomorrow".

WITH IT Tasks appear by themselves: an opened quote, a hot lead, an expiring domain, a quiet deal.

2. No more searching

BEFORE Three inboxes, a spreadsheet and a notebook just to see where a case stands.

WITH IT One timeline per client; press "/" to find anything, even without accents.

3. Less typing

BEFORE Quotes in Word, invoices elsewhere, company details typed in again and again.

WITH IT A quote from a template in a minute; once accepted, fee and invoice are ready.

4. You call at the right time

BEFORE You send the quote, then guess whether they've read it.

WITH IT You see who opened the quote or viewed prices – and call whoever is interested now.

5. Fewer clients slip away

BEFORE A form submission gets lost in the inbox; a deal is forgotten.

WITH IT Every enquiry lands in Leads; the "Needs attention" list shows what's stuck.

6. You see what works

BEFORE You run ads and send newsletters, but don't know if they paid off.

WITH IT Cost, leads, deals and revenue per campaign – you put money where it pays.

Do the maths

If searching, remembering and quote-and-invoice admin take **20 minutes** less a day, over a month (**21 working days**):

20 min × 21 days = 420 min

This shows how to calculate it – it isn't a measured result. Plug in your own numbers; with a team, it adds up per person.

≈ 7 hours / month

per person at 20 minutes a day – time back for clients, real work, or going home

Easy to learn

Runs in the browser on computer and phone, with help on every page. One hour of training.

For the whole team

Everyone sees the same thing. No per-user fees: adding a colleague takes a minute.

It stays yours

Runs on your own hosting, in English and Hungarian; the database is a single file that belongs to you.

Try it now – no sign-up

A fictional company's data, in English: click around, change anything.

cogma.hu/crm-demo/?lang=en