



## RMS – Referral Management System

## **Features**

**Maintain Contacts** 

Maintain Leads

Create / Monitor Tasks for Leads

Automated Tasks / Communication

**Customized Email Templates and Automatic Emails** 

Create Contact Groups - Referral Partners, Clients, BNI, BNI GPT etc





Dashboard Contacts ▼ Lead Tasks ▼ Emails ▼ Masters ▼ Setup



**Pending Tasks** 

## Dashboard



