





Introduction

Fimble's CRM apps offer a variety of data management, automation, communication, and marketing tools to increase customer engagement, frequency, and retention.



Table of Contents

- Overview
- Data Management
- Offers & Coupons
- Cross-selling & Upselling
- Data Sets
- Rewards
- Communication
- Unit Management
- Detailed Analytics
- Additional Tools



Overview

Key features that allow you to efficiently acquire, serve, and reengage your customers.

Data Management

Customer and lead management, dynamic data collection, and unified customer profiles.

Offers & Coupons

Advanced promotion engine with flexible conditions for offers and coupon management.

Cross-selling & Upselling

Drive higher order value with targeted cross-sell and upsell strategies across the customer journey.

Data Sets

Leverage static and dynamic segmentation to target the right audience with precision.

Rewards

Flexible loyalty programs, incentives, and rewards that boost retention and repeat purchases.

Communication

Omni-channel communication for automated, transactional, and bulk communication

Unit Management

Centralized control and collaboration across business units and franchise networks.

Detailed Analytics

Real-time dashboards, sales insights, and customer profiling to support data-driven decisions.

Additional Tools

Built-in tools for campaigns, tickets, audits, training, and more to streamline daily operations.

Data Management

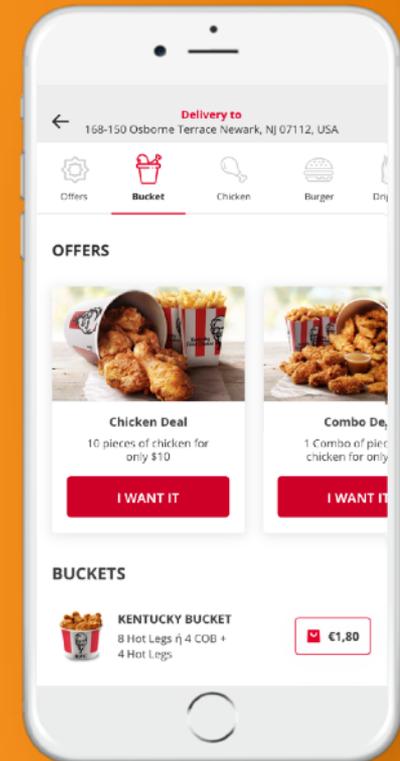
Any successful CRM solution starts with efficient data management.

- **Customer management**—Dynamic customer management with detailed information and profiling data, as well as a customer dashboard that gives you quick access to key insights, including behavioral data.
- **Lead management**—Visitors who have not yet placed an order but engage in other activities, e.g., send feedback or participate in contests, are automatically saved as leads and can be separately managed for future engagement and conversion.
- **Data Collection**—Dynamic, versatile forms that can be used for surveys, tracking customer satisfaction or additional profiling. The system collects all related data within the customer file, which can then be used for segmentation and reporting. If the data doesn't match an existing customer, a new lead is automatically created and can be targeted for promotional campaigns.
- **Feedback**—Use online forms to capture customer feedback and encourage participation with reward points or coupons. Low satisfaction scores can automatically open support tickets to ensure timely follow-up.

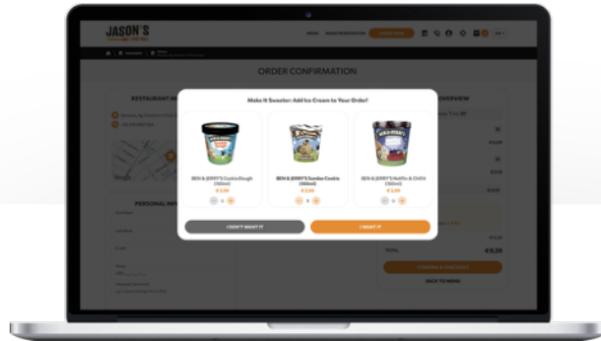


Offers & Coupons

- **Offers** — A powerful offers engine supporting advanced conditions (e.g., schedule, basket value, items, payment method). Includes **guided**, **coupon-based**, and **automatic** offers applied instantly at checkout—no extra steps required.
- **Coupons** — Create **recurring** or **one-off coupons** with unique codes and optional assignment to **specific ticket types**. For example, when customers file a complaint (e.g., late delivery), the system can automatically—and upon agent confirmation—assign a discount coupon (e.g., 10% off the next order). The coupon is then immediately available at checkout for any future interactions across all ordering channels.



Cross-selling & Upselling



Cross-selling — Automatically suggest relevant products in the cart before items being selected.

Upselling — Drive higher basket value with targeted upgrade options:

- Offer instant upgrades (e.g., “Go large for \$1”) directly on the product page.
- Add upgraded items to the cart in one click.
- Support product, variant, and combo-based upsell rules.
- Display upsell prompts via pop-ups or banners across the menu and checkout.

Digital Signage

Enhance the in-store experience with **dynamic screen content**, including new products, promotions, and pricing. Drive customer engagement at the point of sale and increase average order value through targeted visual messaging.

Friday (☀️) Happy Hour Menu! → <small>Saving by our food and beverage happy hour promo for a feast of flavor.</small>	FRAGILE AND SPICES RESTAURANT 
	ALL MOCKTAIL MENU (2 PM - 4 PM) \$4.00
CROISSANT SANDWICH (11 PM - 1 PM) \$8.00	TERMS AND CONDITIONS: ↻ <ul style="list-style-type: none">• Available on Friday only• Applicable for dine-in only• Can not be combined with another promo• Applicable to all payment
	<small>Our contact and location: 123-456-7890 123 Anywhere St., Any City</small>

Data Sets

Improve marketing, operations, and engagement with flexible data segmentation for customers, leads, stores, and any other entity within the system.



Static Segments

Manually group users by applying filters

Use cases

- **Target segments with precision** by building focused campaigns (e.g., re-engage customers who haven't ordered for 180 days).
- **Organize data clearly** for cleaner reporting.
- **Quickly pull lists** for tactical activities like promotions or follow-ups.



Dynamic Segments

Automatically update groups based on changing behavior

Use cases

- **Easily maintain recurring campaigns** like email series and loyalty programs (e.g., segment loyal customers after their third order in a month and engage with them via email).
- Always **keep up-to-date segments** without constantly refreshing lists.



Buying Habits

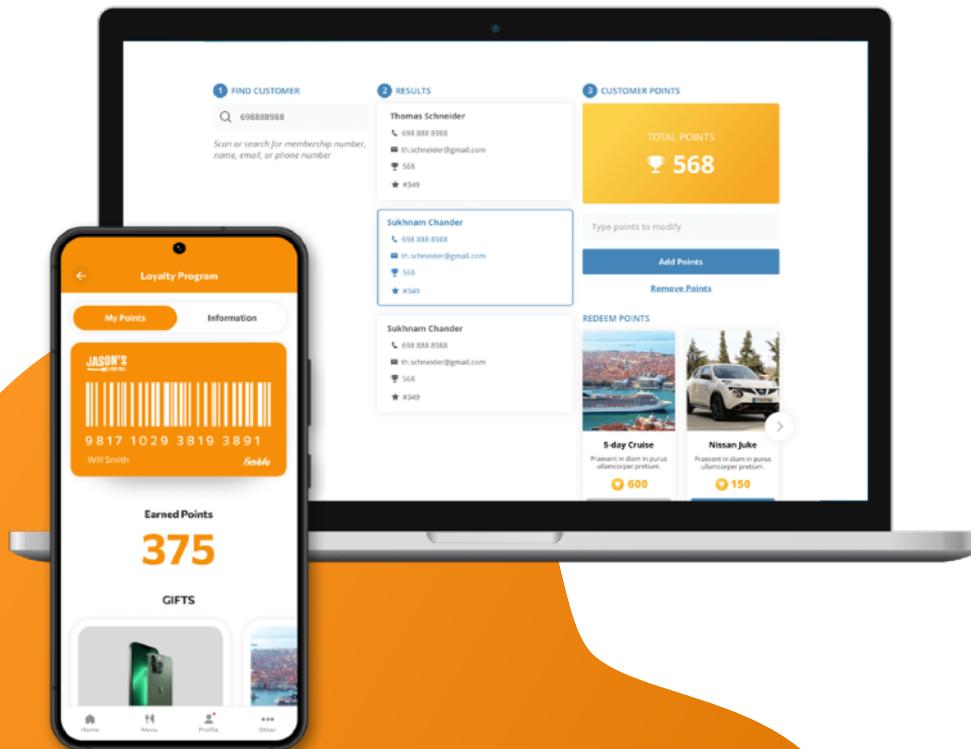
Dynamic customer segmentation based on buying habits

Use cases

- **Create personalized offers** (e.g., target segments “Chicken Lovers” or “Vegan Regulars”).
- **Cross-sell** and **upsell** more strategically based on what customers already prefer.
- **Recognize product trends** and adapt menus, specials, and promotions accordingly.

Rewards

Drive repeat purchases and customer loyalty through flexible, automated rewards.



- **Loyalty Program** — A flexible loyalty engine that rewards customers for purchases and actions. Configure how points are earned and redeemed, including discounts, gifts, coupons, or products.
- **Signup Bonus** — Increase program adoption with signup bonuses providing instant incentives (e.g., “100 points on signup”).

Communication



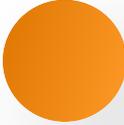
Automated Communication

Deliver automated emails and push notifications throughout the customer journey (e.g., order confirmation, driver departure and arrival, etc.) for complete transparency.



Mass Communication & Omni-channel Support

Send targeted or mass communications via email, SMS, and push notifications, either directly through the platform or via third-party integrations (e.g., mailing list tools).



Email Performance Tracking

Monitor email engagement with read status and open rate for better campaign measurement.



Automatic Communication Archiving

Log all interactions centrally and within each customer profile, giving agents full visibility into recent communications for more informed support.

Unit Management

Manage and scale your network with full visibility and control across all business units.

- **Unit Management** — Centralize and monitor unit performance while collaborating with franchisees to strengthen brand consistency.
- **Content** — Share forms, checklists, and files to streamline communication and maintain strong franchise relationships.
- **Field Audits** — Plan and execute audits and visits efficiently with a dedicated mobile app for supervisors.
- **Training** — Upload training material, supervise progress, set up exams, and issue certifications.
- **Incident Management** — Record, track, and report incidents across the network.
- **Store Manager Portal** — Enable franchisees to manage business data directly and increase productivity of each unit.



Analytics

A set of powerful reports that provide detailed analytics across key CRM areas:

- Customers & Leads
- Sales & Conversions
- Products
- Feedback
- Workflow
- Buying Habits
- Performance
- Campaigns & Events
- Tickets
- Communication
- Discounts
- Contests
- Rewards & Gifts

Additional Tools



TICKETS

Manage and monitor all B2C and B2B tickets and complaints to ensure fast detection, efficient resolution, and improved customer satisfaction.



CAMPAIGNS & DOCUMENTS

Plan online and offline campaigns, and track data for analysis combined with modules like forecast and schedule. Manage files and folders dynamically for internal and external access.



CONTESTS

Set up contests, assign gifts, and declare winners to increase customer engagement.



MARKETING EVENTS

Organize marketing events and manage every impacted operation — sales, inventory, and staff scheduling — with visibility through a shared internal calendar.



TAGS

Apply tags across customers, stores, products, and any other entity within the system to enable advanced segmentation and richer reporting.



COMPETITION

Monitor competitors, including locations, pricing, and offers, to stay informed and competitive.



Thank you!



For more details you can visit us at

www.fimble.io

