



# Sales CRM

## Customer Relation Management System

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# Objective

To provide Platform to Sales Team to improve Performance in every activities done at the time dealing with customers.

To make operations easier , faster, -ready information processed as and when required- to give accurate information to customer and have accurate decision Support system , this will increase Profitability.

The system should also provide control points , Approval System when ever required in Policy and Work Flow – Internal Communications and actions taken details recording to generate good level of accountabilities between different departments.

Transactions required should have all capabilities to capture required data necessary for further actions, instructions , validations and other control points.

# Modules

1. Contact Management System
2. User level Access Control
3. Dealer Management System
4. Communication Management System – Infra Vision Communicator  
Email Management for external and internal Emails.  
Task Management System – Work flow.  
Follow up Management System  
Reminder Management
5. Document Management and Searching
6. Inquiry Management System
7. Quotation Preparation – Amendment and Management , Special Price Approvals.
8. Order Taking and Approval
9. Sample Management System
10. Complaint Management System

# Contact Management System

- Contact type- Customers, Suppliers, Dealers, Agents, Employees , etc.
- Categories- Individual for each Contact type.
- Addresses, contact numbers, email ids, and other information.
- Multiple Persons – contact details for each contacts.
- Contacts can be link with various Link fields –like Area, Industries type, Segment, Size, Products (deals with), etc.
- User wise – Access Control to view information.

# User level Access Control

- Number of Users and Role of users can be created.
- User wise Access rights can be defined based on Link fields.
- Structure can be defined to achieve secured and dynamic access rights role.

# Communication Management System – Infra Vision Communicator

- Corporate wise - Internal / External Communication Management

## **Email Management System**

- Auto email filing – User wise, external contact wise – subject wise email storage.
- Higher Authorities can monitor - Employee wise, customer wise- dealer wise email for correspondence tracking.

## **Task Management System**

- Work ( Task) can be generated by any user for any user.
- Task will go in Work flow and reporting will be entered by following user. Status will be show to the initiator.
- System can generate Auto Task and Allocate it to predefined user with dynamically generated message.
- Communication Dash board for each user. Action can be taken for pending task, follow up.
- Reminder can be set for himself or for any other user.

# Communication Management System – Infra Vision Communicator

## **Follow up Management System**

- Follow up can be set for any user for himself or any other user.
- System works on Business Intelligence for Follow up generated by system itself automatically.
- Content of Message can be generated automatically by using dynamic Message Builder.
- Smart engine for generating follow up based on multiple preconfigured criteria, like Customer type, Area, Products, product group, size, Industry type, etc.
- For regular customer, dealers , agent – periodic follow up can be set. System will pick up intelligently data from Sales Forecast, Annual sales contract or last consumption pattern.
- Follow up generated will go in regular work flow.

## **Reminder Management**

- Reminder can be set – for daily , weekly, monthly or yearly,
- It can set by any user for himself or any other user/ multiple users.
- Message can be generated by dynamic message builder.
- Reminder will can generate task or initiation to the user by internal message or auto-email.

# Document management and Searching

- Document can be stored based on different defined criteria like document type, sub type, department, subject etc.
- Secured document management - User wise access rights based on different criteria.
- Document version control for same reference document saved again.
- Document Auto save feature from transaction with preconfigured criteria.
- Work flow for document review or approval.
- Document set of criteria can be different for different Company or department.
- Required Document can be viewed at defined place by system.
- Easy Search available for document viewing- based on user access rights.



# Inquiry Management System

- Inquiry can be entered when it is received by authorized user
- Category of inquiry –like Source of inquiry, area , Product, Industries type, Size, etc.
- Inquiry can be entered from E-mail management System ( part of communicator)
- Inquiry can be allocated to one of system User-Marketing Person, Dealer or Agent.
- Task can be generated at the time of Inquiry allocation.
- If Sample required, sample request can be generated. The request will go for approval before sending.
- If Sample received with inquiry as a specification, this can be sent for analysis or Quality testing in QC department or R&D department.
- Competitor Details can be entered, Marketing information like competitor rates, product wise ranking and other information can be entered which is useful for marketing person at the time of handling Inquiry.
- Document received from Customer can be attached with Inquiry.
- Pending Inquiries- list based on criteria can be seen by any authorized person. Different level of authorization Can be define based on different criteria, like Area, Products, etc.
- Action taken or status of inquiry can be seen by any responsible person for that inquiry.
- Analysis – Customer wise – Dealer wise – Product wise.

# Quotation Preparation – Amendment and Management

- Quotation can be prepare based on Inquiry received.
- Price list based on Different sales type.
- Price control while preparing quotation. Product rate with effective dates.
- Customer wise Price and terms and conditions.
- Quotation approval – work flow available.
- Follow up – status update can be done in work flow.
- Quotation amendment.
- Special price can be applied and approval from authorized user for special case.
- Special price – terms based like minimum quantity, up to fix date, Total Value sale, etc.

# Order Taking and Approval

- Order can be booked based on Inquiry , quotation given .
- Order type based on sales type.
- Details can be captured – check list can be set while taking order, like Dispatch details, Packing remarks, Shipment details, Documents required, etc.
- Control points can be define to have better business flow. ( Important if it is linked with ERP)
- Order approval- work flow.

# Sample management system

## Sample In

- Inward Sample Coming for Analysis along with customer requirement
- Inward sample coming from Sales Department – as a competitor Product for R & D, New Product development,
- product improvement or to know the costing of Competitor Product.

## Sample Out

- Product Sample to be sent to customer for Product approval.
- Customer wise – Sales man wise – Agent wise – dealer wise Sample dispatch report
- Feed back on sample – follow up.
- Order received for the Product sample sent.
- Sample Costing

# Complaint Management System

- Complaint can be entered by registered user or non registered user in the system. User can be Employee, Customer, Agent or Supplier.
- Depending on type of Complaint, system will auto forward to the designated person
- Each user handling Complaint at different level can give his remark or details of action taken, instruction to be followed by next person.
- Document can be attached at any level. ( Optional)
- Complete tracking will be monitored with all related details.
- Dynamic Dash board for each level of person to show status - pending, completed or in progress issues.
- Location – Zone wise – Type of Complaint wise designated person wise status chart for each users.
- Tracking report can be seen or taken print out or it can be sent by e- mail.
- Analysis for various aspects to know employee wise efficiency and Complaint type wise performance.
- Complaint will flow from one person to other person on defined user path, but it can be diverted to any other user also.
- Each type of Complaint can have different user route (Path) and Different access rights.

# Complaint Management System

## Benefits:

- Web based interface allows to handle system from any where in the World.
- Fast redressal of all the Complaints higher accountability.
- Greater efficiency in working.
- Higher satisfaction to customers or employees
- Easy track of Complaints at any point of time.
- System Security for movement of Complaints.
- User wise access rights will make good accountability.
- Encryption - 128 Bit Encryption is used. No One can identify user Password, Document Path, Document Name without Application. Flexibility- Application is based on Intranet or Internet, so add Secured Documents in Application & Access it from anywhere.

# Complaint Management System

## Workflow

- An example scenario is presented to demonstrate how a Complaint Management System would work:
- By User Id, Complaint can be logged by login in Complaint Management System.
- From Complaint Generation Form, they will select there relevant problem and lodge the Complaint.
- Complaints can be raised in specific predefined templates which are given in system.
- Operator or Customer can select the Complaint and the respective engineer to be assigned to
- Log of Complaints is being maintained by system.
- Customer/Operator having facilities of dashboard which will guide them and help them to track the Complaint status.

# Complaint Management System

## Workflow

- A customer service technician receives Complaint from customer .The technician verifies that the problem is real, and not just perceived.
- Technical person have facilities of dashboard & he can see Complaint at his desk & either proceed for Follow up procedure in department or resolve and get back to relevant customer.
- Technical person have also log book of Complaints, User Login, Notes, status of Complaints.
- Resolved Complaints are shown to main page for approval purpose & for information purpose.
- Copy of the Complaint and its solution provided by the technician will also go to the department head or the Manager.
- Complaint if not resolved in stipulated or given time will send a intimation to the higher person in the hierarchy about the lapse of time.
- On resolution of the Complaint the customer will be intimated about the same and his/her final feedback noted.





Thank You

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