

Customer Relationship Management (CRM)

(Version 1.0)



Software Developed By



Customer Relationship Management (CRM)

Introduction:

We have developed an IT solution for Customer Relationship Management in order to overcome drawbacks of traditional Enquiry Management System against Client. As we well known that Customer Relationship Management system is usually referring to Operations, that's why we Create a centralized system that manage, analyzed, take care of our transaction and provides output in the format of report that are very easy to understand to a common person with little knowledge.

We developed a web application (Software) to manage all activities, Enquiries of Customer Relationship management by Company with department like marketing, Offers, Employee Task, Employee Performance, Employee Tracking, Business Tracking and Business Analysis .This application is capable to track each and every transaction that needed to store and manage Different Parts.

Customer Relationship Management



Customer Relationship Management (CRM)

Customer Relationship Management web Application contain total 8-10 modules. Each and every module play an important role to make a system as a whole, If we carefully observe each module then we will find that all this module are internally correlated means bug in one module may affect other module, but the surprising fact is contrast to the above conclusion means on the basis of reach experience in inventory domain and strong technical support we have developed each module independently means isolated from other module. **The major benefit of such development is that on the basis of customer requirement we can easily extend our software without affecting other functionality.**

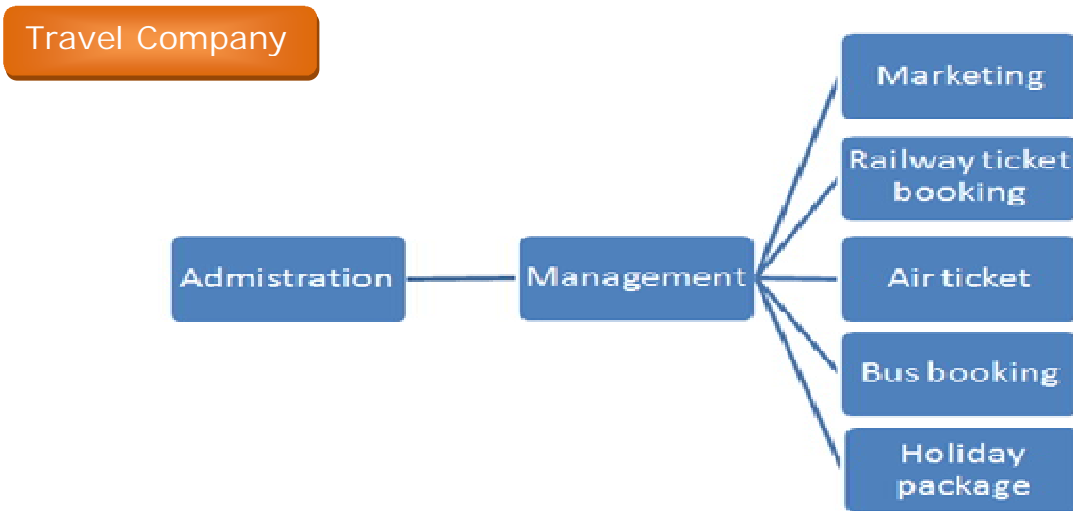


Fig: Application hierarchy

The above fig show the level for managing CRM application

Explanation of each Module

Masters

- Employee
- Employee Rights
- Employee Area
- Interested Category of Product
- Sub Category of Product
- Source
- Status
- Purpose
- Industry Type

The above diagram shows that all entry in master form is one time entry, means we get all master form entry in all other transaction form. The real benefit of this master form comes in

Customer Relationship Management (CRM)

picture when client place hundreds of Enquiry with same Interested Category of Product, Sub Category, imagine how typical it is.

In our scenario we provide a facility due to which once Employee make Enquiry entry of client Interests in master form then in all other transactions he will able to choose Interested Category of Products name and Product Sub Category name from combo box.

No.	Interested Type	Code	Edit	Delete
1	Air Ticket	Cont	Edit	Delete
2	Bus Booking	0223	Edit	Delete
3	Cab	Eng	Edit	Delete
4	Domestic Holiday		Edit	Delete
5	Hotels	006	Edit	Delete
6	International Holiday		Edit	Delete
7	Railway Ticket		Edit	Delete
8	Resort		Edit	Delete

Fig: Interested Category Master

SNo	Sub-Code	Sub Category	Code	Edit
1	DEC	Domestic -Economy Class	Cont	Edit
2	DBC	Domestic -Business Class	Cont	Edit
3	CAB	AC	0223	Edit
4	CAB	Non AC	0223	Edit
5		AC	Eng	Edit
6		Non-AC	Eng	Edit
7		Kashmir		Edit

Fig: Sub Category Master

Enquiry

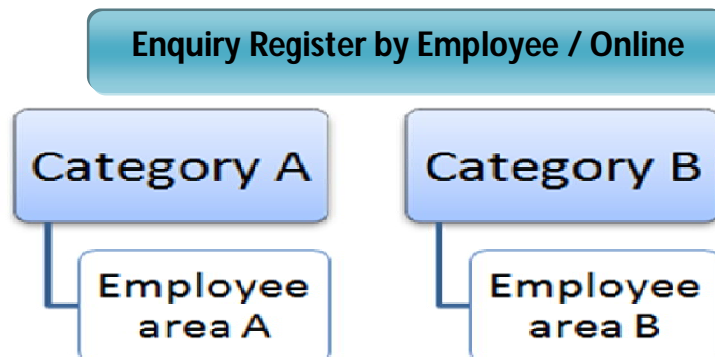
- New Enquiry
- Enquiry Follow-up
- Enquiry Revision
- Enquiry Offer sent To Client
- Final Enquiry
- Cancel Enquiry



Above diagram show all process briefly means in this module user can place Enquiry, Client Interested in Category and According to Client Make then Best budgeted plan by marketing or Enquiry handler Employee To client By Enquiry. Once Enquiry Created Employee can Process on any Module like follow-up, Offer Sent, finished Enquiry.

Employee Can Manage Different Requirements from Client, or generate No of enquiry for One client. Application can manage different category enquiry for different Employee Automatically assign to particular employee who work on that area

Customer Relationship Management (CRM)



- **New Enquiry**

According to Interested Category Allotted To Employee at time of saving Enquiry Having advantage to allotment, who have minimum enquiry count it appear on top and auto selected , if any other condition Employee can change allotment from list , one enquiry one employee . list of enquiry appears in enquiry Report also, in enquiry report employee can see created enquiry as well as allotted enquiry .

Client Details

Client Name : * Shrinath Mule Shrinath Mule
Mob. No : 91-9865464654 Email Id : abhishek@gmail.com

Enquiry Details

Enquiry By : **samer**
Enquiry Date : 19/06/2013
Journey Start Date : 22/06/2013
Sector / Intrested In : Domestic Air-Ticket
Category : Business Class
Budget : 4500 Rs./Person
Adults : 2 (Above 12yr)
Infants : 0
Length of Trip : 2 Days
Children : 0 (5 to 12)yr
Seniors : 0
Total Budget : 9000 Rs.
Enquiry Remarks :

Fig: Enquiry Form

Allot Enquiry

Employee	Count
<input checked="" type="checkbox"/> Sameer s Bahad (Domestic Air-Ticket)	29

Customer Relationship Management (CRM)

Fig: Allot Popup

SNo.	Subt.Dt	Enquiry No	Client Name	Category	Allot Dt	Budget (Rs)	
1.	17/06/2013	ENQ/13-14/026/R00	vikash gole	Hotels	18/06/2013	9000.00	
2.	17/06/2013	ENQ/13-14/027/R00	Dileep Chabrya	Domestic Air-Ticket	18/06/2013	9000.00	
3.	19/06/2013	ENQ/13-14/028/R00	Emphin Enterprises Pvt. Ltd	Domestic Air-Ticket	19/06/2013	4545.00	
4.	20/06/2013	ENQ/13-14/029/R00	Shrinath Pule	Domestic Air-Ticket	19/06/2013	9000.00	

• Enquiry Follow-up

In above figer Follow-up on Enquiry , this operation can perform by employee who have this enquiry in list.

After adding follow-up details the list of privous and current followup like this

SNo.	Subt.Dt	Enquiry No	Client Name	Category	Allot Dt	Budget (Rs)	
1.	17/06/2013	ENQ/13-14/026/R00	vikash gole	Hotels	18/06/2013	9000.00	

Client Name : vikash gole Enquiry No : ENQ/13-14/026/R00
Enq. Date : 16/06/2013 Mobile No : 91-9865464654

ADD NEW REMARK

Follow Up

Current Meeting Information :-
Date of meeting : 19/06/2013
Contact Person : Mr Vikash Gole
Remarks : Client Interested in package
Status : Enquiry

Next Meeting Information :-
Next Due Date : 20/06/2013
Next Due Remarks : Client Want Other Package Details also

PREVIOUS FOLLOW UPS
No Previous Remarks

Fig: Enquiry Follow-up

PREVIOUS FOLLOW UPS			
Meet Date	Meet Remark	Next Date	Next Meet Remark
19/06/2013	Client Interested in package	19/06/2013	Client Want Other Package Details also

Fig: added Follow-up View


This is very useful utility for managing follow-up Details, previous and current Follow-up at once against one enquiry on single click, view of follow-up in follow-up transaction with list of follow-ups.

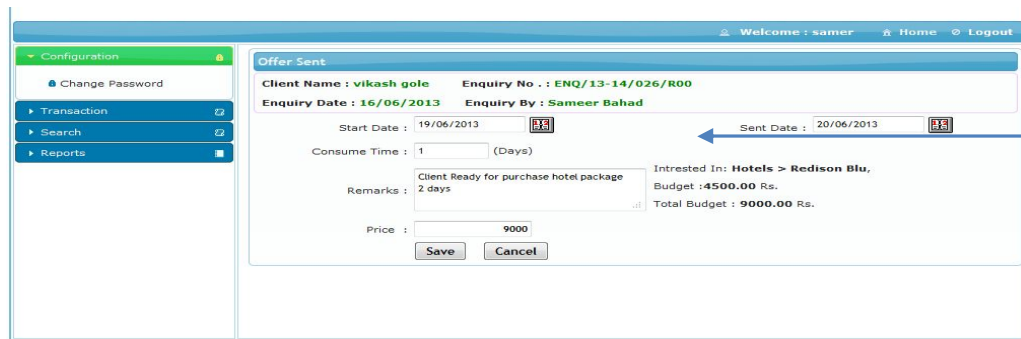
Customer Relationship Management (CRM)

• Enquiry Offer sent To Client

If employee want to sent offer on enquiry, this form will appear with offer sent cost , on this cost client get inform by employee that we have interesting offer for client.

It appears green untill and unless employee not sent offer ,once employee sent offer tag change as orange.Offer sent enquiry appear in Offer sent report also

SNo.	Subt.Dt	Enquiry No	Client Name	Category	Allot Dt	Budget (Rs)	
1.	17/06/2013	ENQ/13-14/026/R00	vikash gole	Hotels	18/06/2013	9000.00	



SNo.	Subt.Dt	Enquiry No	Client Name	Category	Allot Dt	Budget (Rs)	
1.	17/06/2013	ENQ/13-14/026/R00	vikash gole	Hotels	18/06/2013	9000.00	

Fig: Offer Sent To Client

After offer sent show enquiry in orange color and unable to sent again.

• Final Enquiry

Enquiry Final from Here , once final offer sent to client ,the enquiry will remove from employee allotted list. Final enquiry means closed enquiry that enquiries list appear in finshed reports.

SNo.	Subt.Dt	Enquiry No	Client Name	Category	Allot Dt	Budget (Rs)	
1.	17/06/2013	ENQ/13-14/026/R00	vikash gole	Hotels	18/06/2013	9000.00	

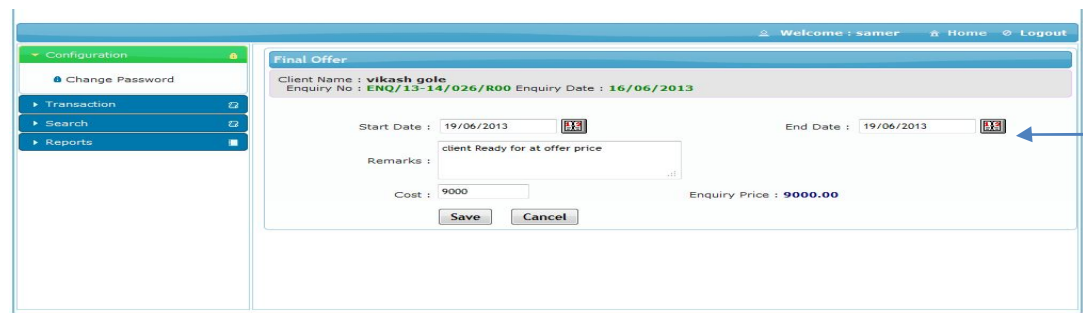







Fig: Final Offer and finish

Customer Relationship Management (CRM)

• Cancel or Regret Enquiry

If sometime need to cancel enquiry by some reasons. You can easily cancel the enquiry as below instructions. It generate cancel report also to show to cancel enquiry report with "who cancel the enquiry ?" and "when ?" ,also other details.

SNo.	Subt.Dt	Enquiry No	Client Name	Category	Allot Dt	Budget (Rs)	
1.	17/06/2013	ENQ/13-14/026/R00	vikash gole	Hotels	18/06/2013	9000.00	    

Enquiry Cancellation Details

Reason for Cancellation :

Remarks :

Task Management

- Task Assign
- Task Status

Management or employee can assign task to employee

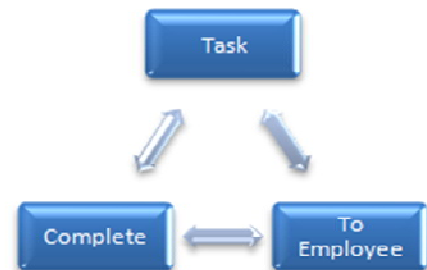
They define status as complete, pending, in process on

Task they have, that report automatically sent to task

Sender. If task sender management or employee not

Satisfied on that work it update and sent again to

Employee, Task can done only when task sender click on complete button, until and unless task will pending on employee dashboard.



Task Assign

Date :

Due Date :

Title :

Description :

Priority :

To :

Remarks :

Fig: Task assign

Search:

From Date : To Date :

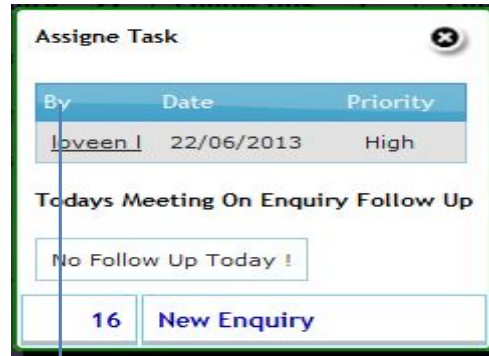
Task List

SNo.	Employee Name	Start Dt.	Due Date	Title	Priority	Status	On Date	Complete
1.	Saneer Bahad	19/06/2013	22/06/2013	Complete Holiday Enquiry	High	--	--	--

Fig: List of assign task

Customer Relationship Management (CRM)

When task assign to employee, employee have popup information when they login with link of task status as below with "assign by", date of assign and priority. The employee have list appear till task not completed.



The 'Assign Task' popup window displays a table with task assignment details. Below the table, it shows a task title and a follow-up status. At the bottom, there is a button labeled 'New Enquiry'.

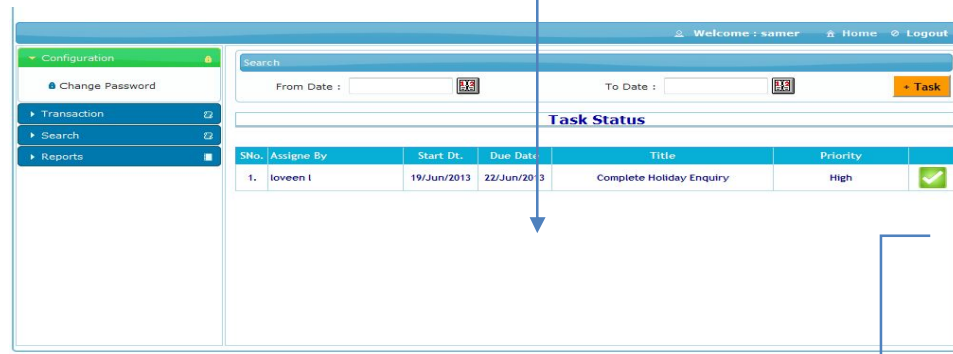
By	Date	Priority
loveen I	22/06/2013	High

Today's Meeting On Enquiry Follow Up

No Follow Up Today !

16 New Enquiry

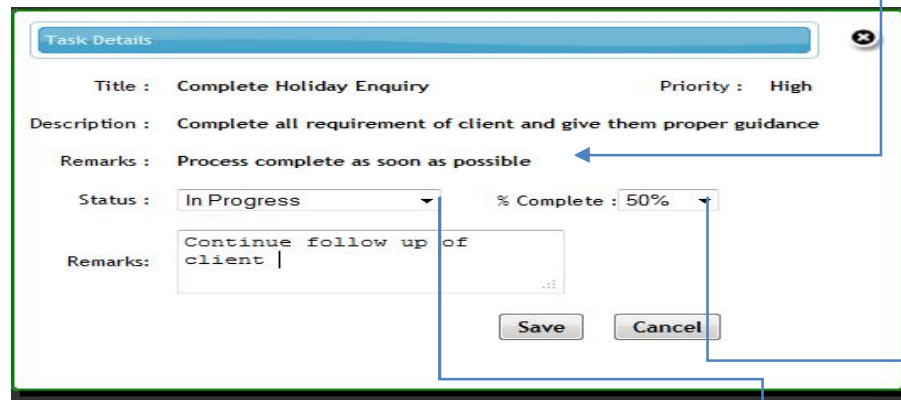
Fig: Got Employee alert



The 'Task Status' table lists tasks assigned to the employee. It includes columns for SNo., Assign By, Start Dt., Due Date, Title, Priority, and a status indicator.

SNo.	Assign By	Start Dt.	Due Date	Title	Priority	
1.	loveen I	19/Jun/2013	22/Jun/2013	Complete Holiday Enquiry	High	✓

Fig: Allotted Task list



The 'Task Details' popup window provides a comprehensive view of a task. It includes fields for Title, Priority, Description, Remarks, Status, and % Complete. There are also input fields for additional remarks and buttons for 'Save' and 'Cancel'.

Title : Complete Holiday Enquiry **Priority :** High

Description : Complete all requirement of client and give them proper guidance

Remarks : Process complete as soon as possible

Status : In Progress **% Complete :** 50%

Remarks: Continue follow up of client

Save Cancel

Fig: update task status



The 'Task assign status' table provides a detailed overview of task assignments, including the employee name, dates, title, priority, status, on date, and completion percentage.

SNo.	Employee Name	Start Dt.	Due Date	Title	Priority	Status	On Date	Complete	
1.	Sameer Bahad	19/Jun/2013	22/Jun/2013	Complete Holiday Enquiry	High	In Progress	20/06/2013	50%	

Fig: Task assign status

Customer Relationship Management (CRM)

The screenshot shows a web application interface for CRM. On the left, there is a sidebar with a 'Masters' section containing a list of master data types: Client Type, Source, Location, Status, Designation, Employee, Industry Master, Project Master, Digestor Master, Offer Master, and Requirement Master. Below this are 'Transaction' and 'Reports' sections. The main area is titled 'Task Assign' and contains a form with the following fields: Date (19/06/2013), Due Date (22/06/2013), Title (Complete Holiday Enquiry), Description (Complete at requirement of client and give them proper guidance), Priority (High), To (Sameer Bahad), % Complete (25%), Status (In Progress), and Remarks (Process complete as soon as possible). At the bottom of the form are three buttons: Update, Cancel, and Complete.

Fig: Update Task

When it complete click on complete button the task will remove from both sides sender and recover , Application gives report on task complete ,how many task complete and when ,by whom. It shows list of all task which completed

Reports

Employee Reports

- Client Report
- Enquiry Report
- Enquiry Allot Report
- Enquiry Self Allot Report
- Enquiry Follow-up Report
- Offer Sent Report
- Final Offer Report

Management Reports

- Total Enquiry Report
- Allotted Enquiry Report
- Self Allotted Report
- Follow-up Report
- Offer Sent By Report
- Offer Finished By Report
- Employee Status
- Employee Performance

Customer Relationship Management (CRM)

Employee Dashboard and reports

When employee Login they will appear dashboard like this, this dashboard show report on employee activity. Client count, Enquiry count, Follow-up count, offer sent count, final offer count, allotted enquiry count, self allotted enquiry.

Yearly graph on enquiry created; funnel show enquiry, follow-up and offer sent
In other hand employee will get separate report on client, enquiry, allotted enquiry, offer sent, final offer, cancel enquiry.

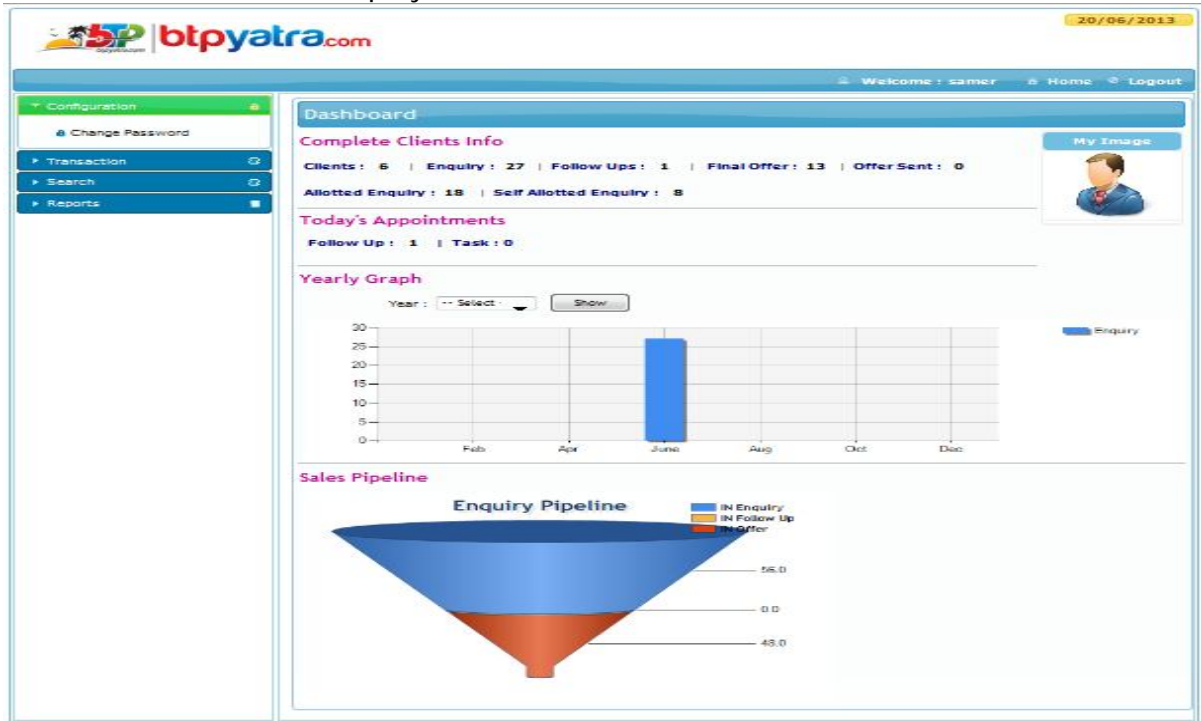


Fig: Employee Dashboard

Enquiry Allot reports

All report having facility of searching criteria from date to date and search by client name, enquiry no, interested category, monthly, amount wise etc.

The report includes the following search filters:

- From Date: [] To Date: []
- OR Client Name: [- Enter Client Name / Keyword -]
- Buttons: Search, Reset

Enquiry Allot Report

Filters: -Enquiry No- [], -ClientName- [], -Start month- [], -Intrested In- [], -Allot Month- [], -Budget- []

Buttons: EXCEL, WORD, PRINT

SNo.	Enquiry No	Client Name	Start Dt.	Category	Allot Dt	Budget (Rs)
1.	ENQ/13-14/027/R00	Dileep Chabriya	17/Jun/2013	Domestic Air-Ticket	18/06/2013	9000.00
2.	ENQ/13-14/028/R00	Emphim Enterprises pvt. ltd	19/Jun/2013	Domestic Air-Ticket	19/06/2013	4545.00
3.	ENQ/13-14/029/R00	Shrinath Mule	20/Jun/2013	Domestic Air-Ticket	19/06/2013	9000.00

Fig: Employee Allot Report

Customer Relationship Management (CRM)

• Management Dashboard and reports

When we have login into the application dashboard shown as below. Dashboard show yearly report on employees' activity. First table shows count of client, enquiry, allot enquiry, self allot enquiry, follow-up enquiry, offer sent enquiry, finish enquiry and cancelled enquiry at once against all employee from different departments.

First graph shows the employee performance in current month with respective enquiry count. Second graph shows the business of company from employee. Business profit graph with respective the enquiry, finish enquiry and cancel enquiry.

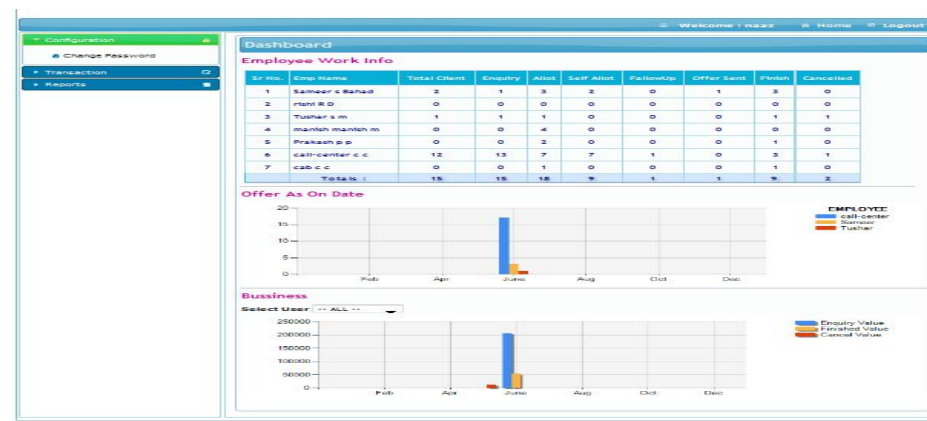


Fig: Management Dashboard

• Daily Business Report

This report gives daily employee working status, what type of work done today and in which area employee performing lacking. Gives daily activity instantly, management can also see previous day reports.

First table shows all employee activity with client, enquiry, allot enquiry, self allot enquiry, follow-up, offer sent, final offer and cancel enquiry on selected date. Second table shows sum of today's enquiry cost, sum of today's finish enquiry cost and sum of loss of enquiry (cancel or regret) today. Second table amount in form of graph with respective amount of enquiry, finished enquiry and cancel enquiry. Report available in excel sheet, word format and html report format ready to print.

Customer Relationship Management (CRM)

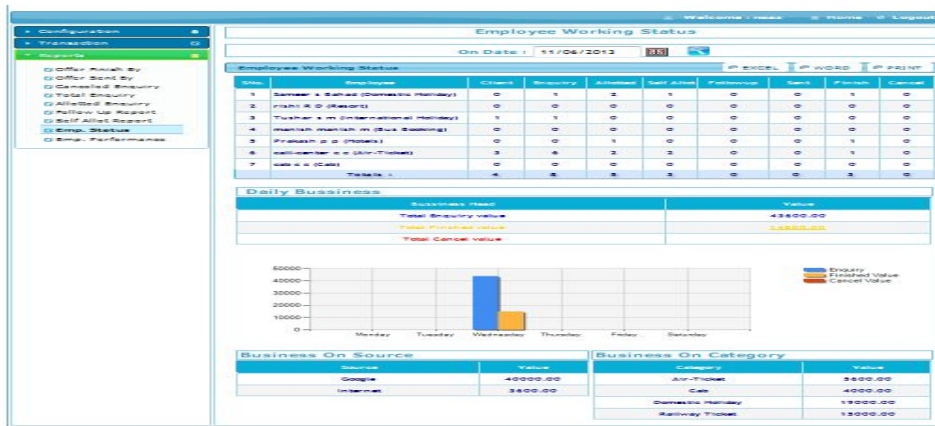


Fig: Daily Business Report

Employee Performance report

Management need to monitoring on employee with respective employee work, on this requirement we create particular employee performance on daily and monthly activity.

First table display client, enquiry, allot enquiry, self allot enquiry, follow-up, offer sent, final offer and cancel enquiry on selected date or month. Second table display business on enquiry, finished enquiry, cancel enquiry, balance with respective category. Third table are having list of all finish enquiry by selected employee. This full page report available on excel, word, html report format ready to print.

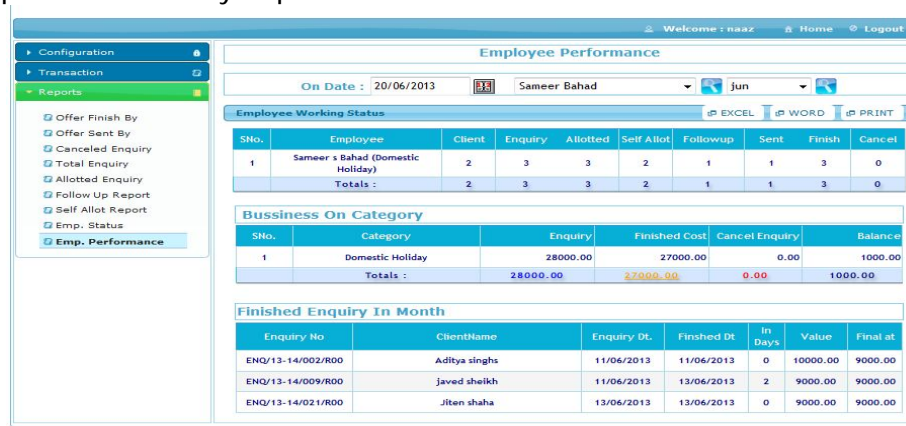


Fig: Employee Performance Report (daily/monthly)

Allot Enquiry report

Which enquiry allotted to whom, when and other enquiry details also at once. Having capacity to search on different parameters like client name, enquiry month, journey start month, allot enquiry month and employee wise. Report show details on mouse over Report available in excel, word, html format also.

Customer Relationship Management (CRM)

The screenshot shows the 'Allot Enquiry Report' interface. On the left is a sidebar with navigation options: Configuration, Transaction, and Reports. Under Reports, several options are listed, including 'Allotted Enquiry'. The main area features a search bar with 'From Date' and 'To Date' fields, and a 'Search' button. Below the search bar, there are dropdown menus for 'All Client', 'Enquiry month', 'Start Month', 'Allot Month', and 'All Emp'. The report title 'Allot Enquiry Report' is displayed, along with buttons for 'EXCEL', 'WORD', and 'PRINT'. The report content is organized into sections for different clients: Aditya singhs, Hemant Kumar, and Dinesh Gupta. Each section contains a table with columns for Enquiry, Interested In, Enquiry Dates, and Allotment Details.

Client Name	Enquiry	Interested In	Enquiry Dates	Allotment Details
Aditya singhs	ENQ/13-14/001/R00	Air-Ticket	12/06/2013	To: Tushar m
Aditya singhs	ENQ/13-14/002/R00	Domestic Holiday	12/06/2013	To: Sameer Bahad
Hemant Kumar	ENQ/13-14/003/R00	Air-Ticket	12/06/2013	To: call-center c
Dinesh Gupta				

Fig: Allot Enquiry Report

• Enquiry Details Report

On searching get enquiry details, this report shows different operations done with one enquiry as enquiry full details and who created enquiry, in next tab follow-up of enquiry by which employee, who sent offer to client and offer details, finished on cost by which employee and final offer details.

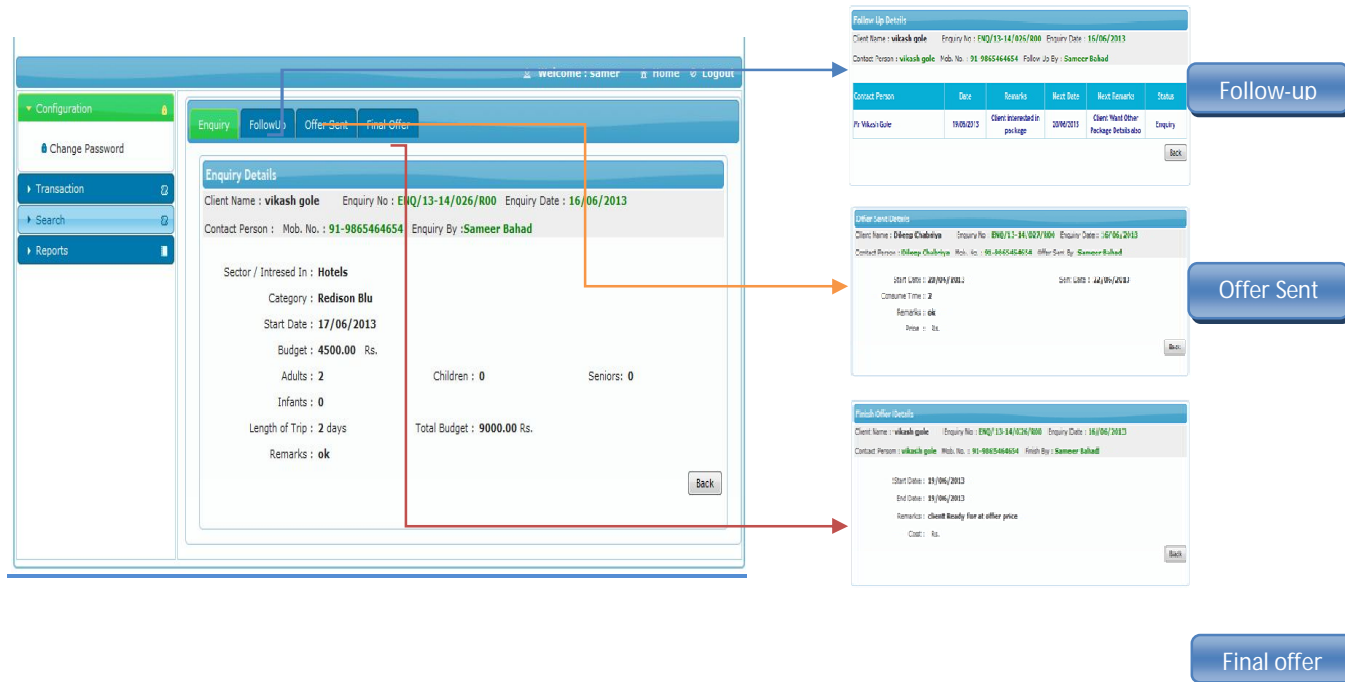


Fig: Enquiry Details Report

Technology:

- Web Based Application on Asp.net 2008/2010
- Data Base – Microsoft SQL Server 2005/2008
- Hosting On Local Server with windows Server 2005/2008 Operating System With M.S. SQL server.

Client List:

- Bharat Travels Point – Nagpur(M.H.)
- Btp Yarta .com – Nagpur(M.H.)
- Lars Enviro Pvt Ltd. - Nagpur(M.H.)
- Waghobanagri.com - Nagpur(M.H.)

Contact Us:

	<p>M/s. Nspire Technologies 94/95, sanctity Apartment, Rajendra Nagar, Hingna MIDC Road, Nagpur – 440016 Email: kratan@nspiretech.com M : 091 9823190086</p>
---	--