Customer Relationship Management (CRM)

(Version 1.0)

Software Developed By

NSPIRE TECHNOLOGIES
inspiring IT revolution

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 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.**

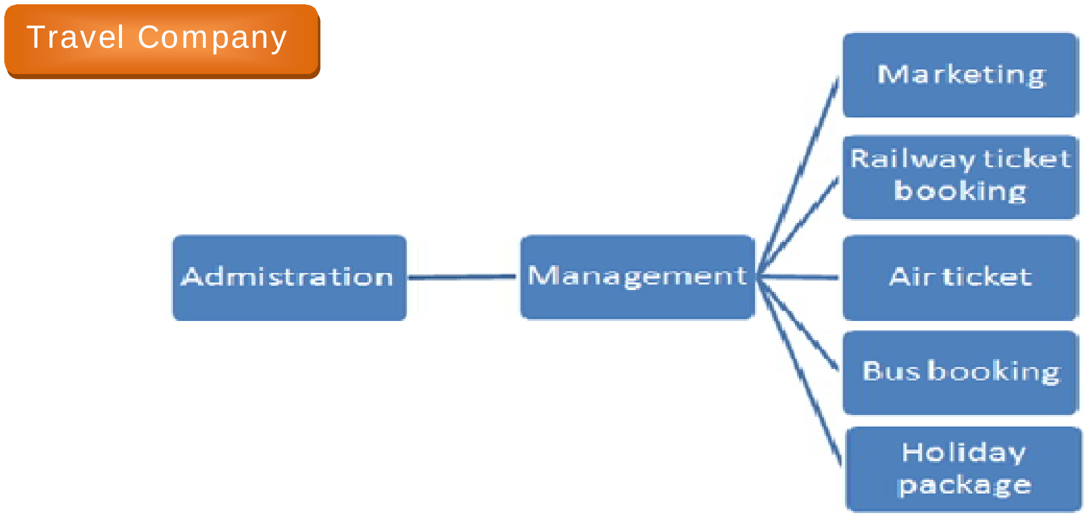


Fig: Application hierarchy

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 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.

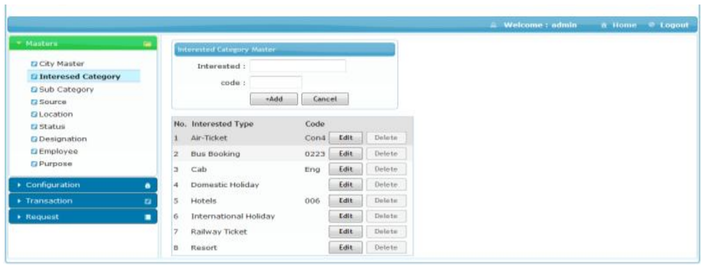


Fig: Interested Category Master

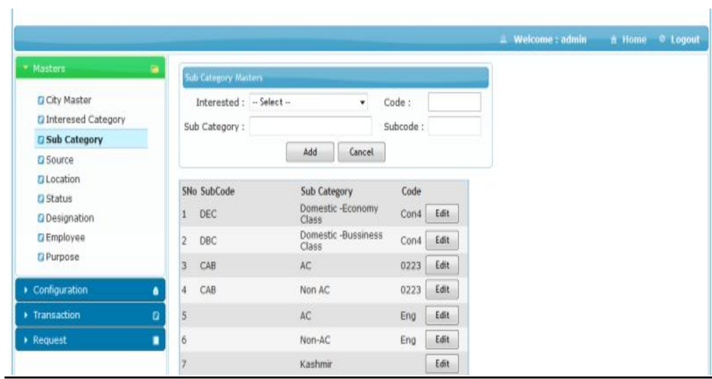


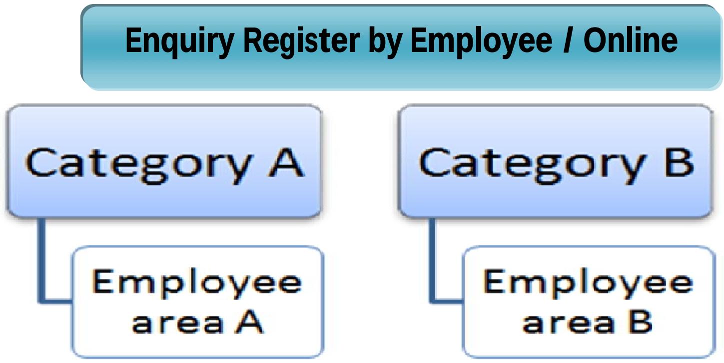
Fig: Sub Category Master

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



- **New Enquiry**

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

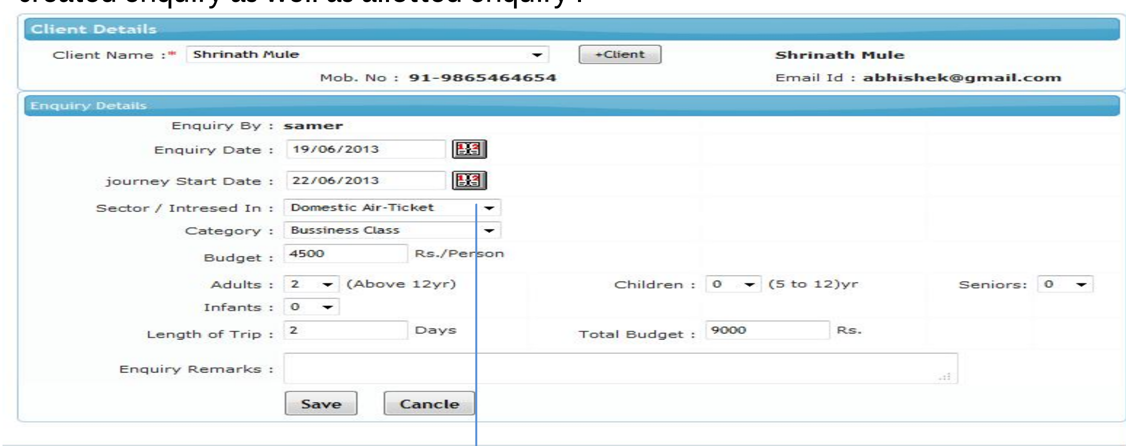


Fig: Enquiry Form

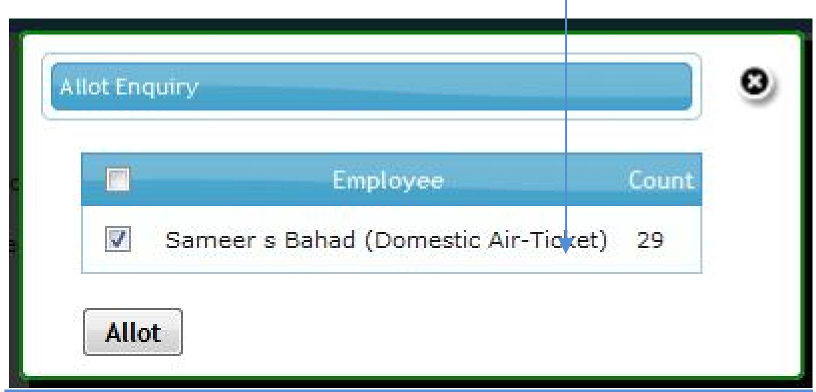


Fig: Allot Popup

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

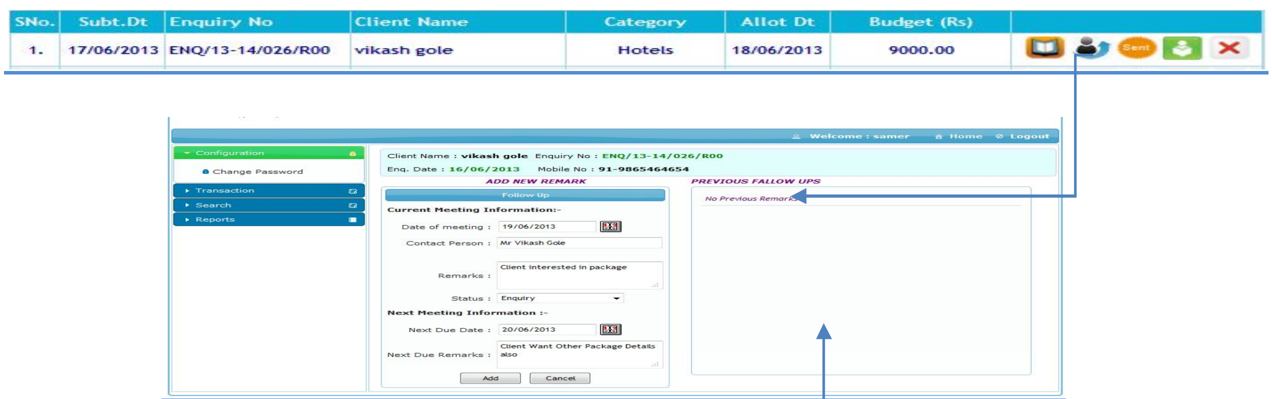


Fig: Enquiry Follow-up

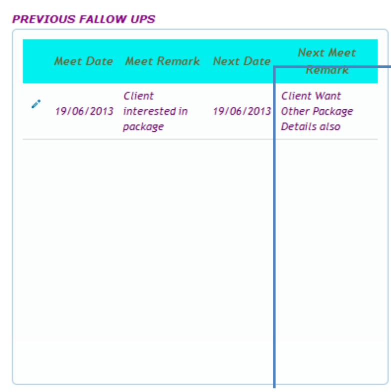


Fig: added Follow-up View

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.

Enquiry Offer sent To Client

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

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

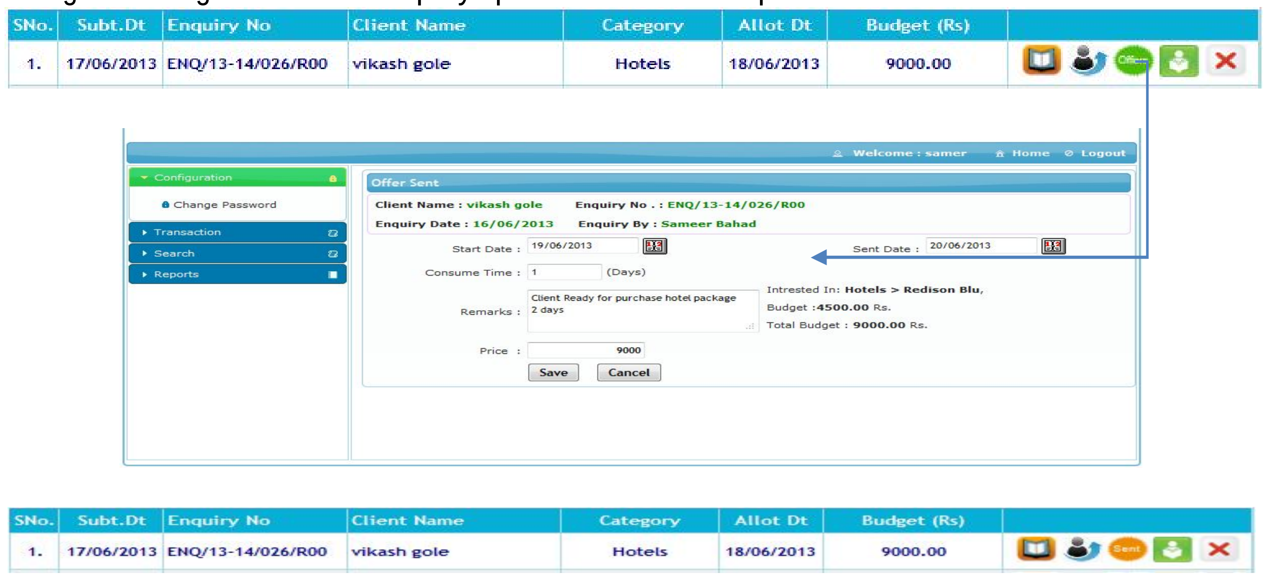


Fig: Offer Sent To Client

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 apear in finshed reports.

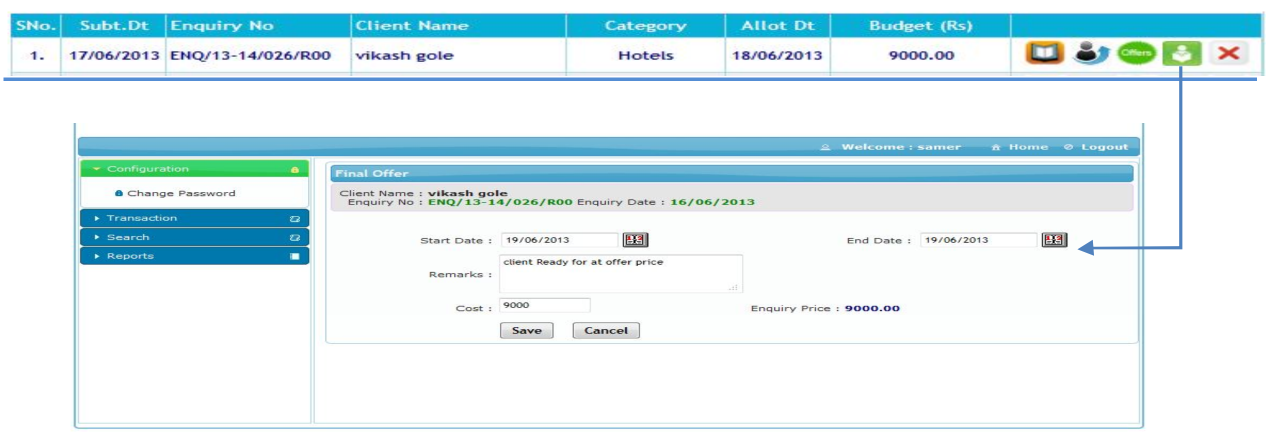
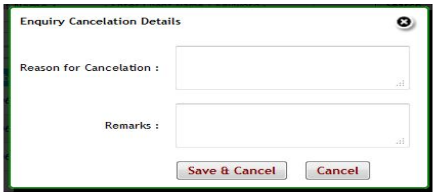


Fig: Final Offer and finish

- **Cancel or Regret Enquiry**

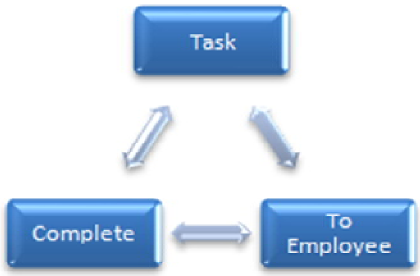
If sometime need to cancel enquiry by some resons. You can easyly cancel the enquiry as below instructions. It generate cancel report also to show to cancel enquiry report with "who cancel the enquiry ?" and "when ?" ,also other details.

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	Sent



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.

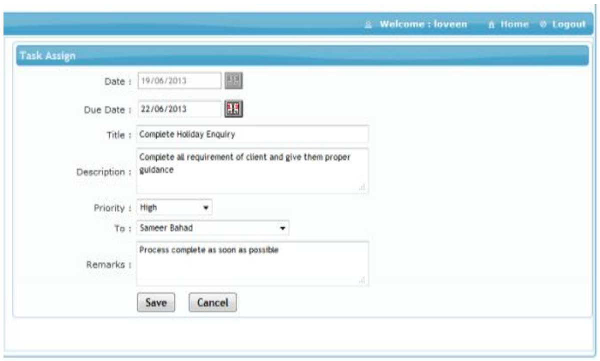


Fig: Task assign

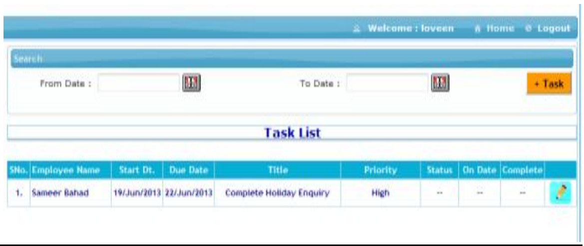


Fig: List of assign task

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.

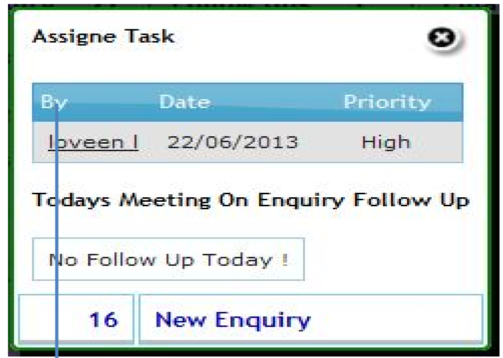


Fig: Got Employee alert

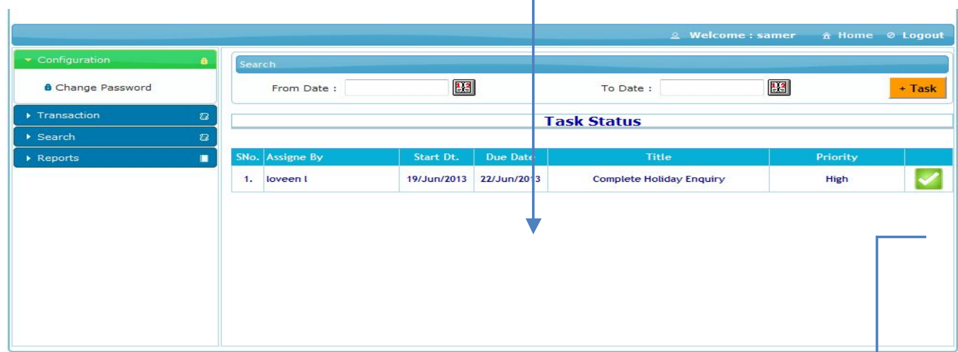


Fig: Allotted Task list

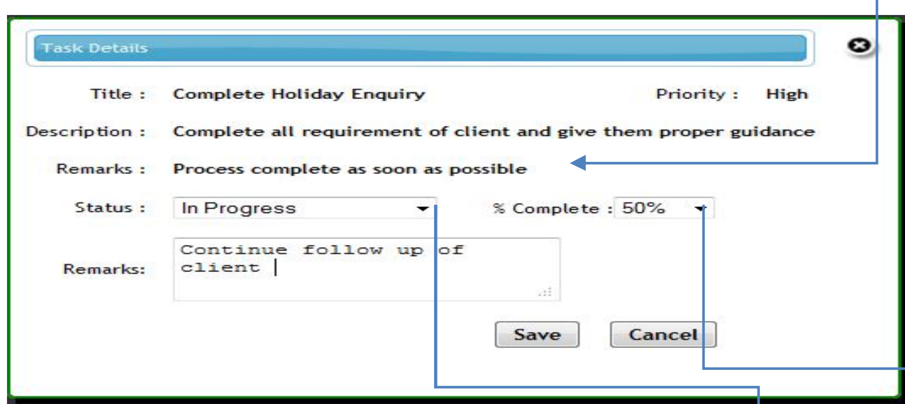


Fig: update task status

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

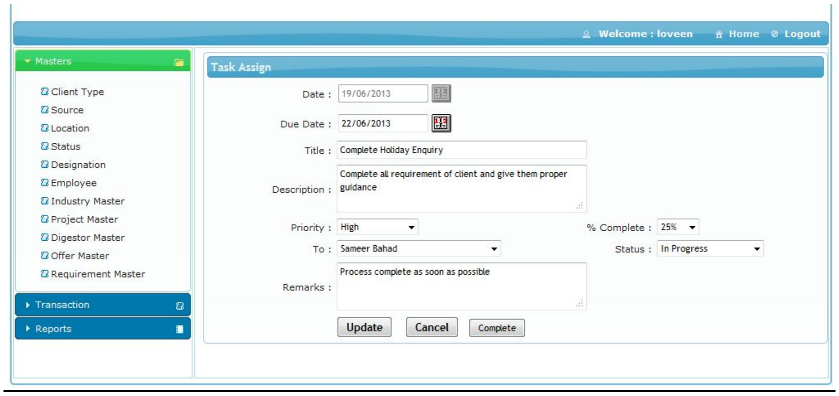


Fig: Update Task

When it compete 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

• 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.

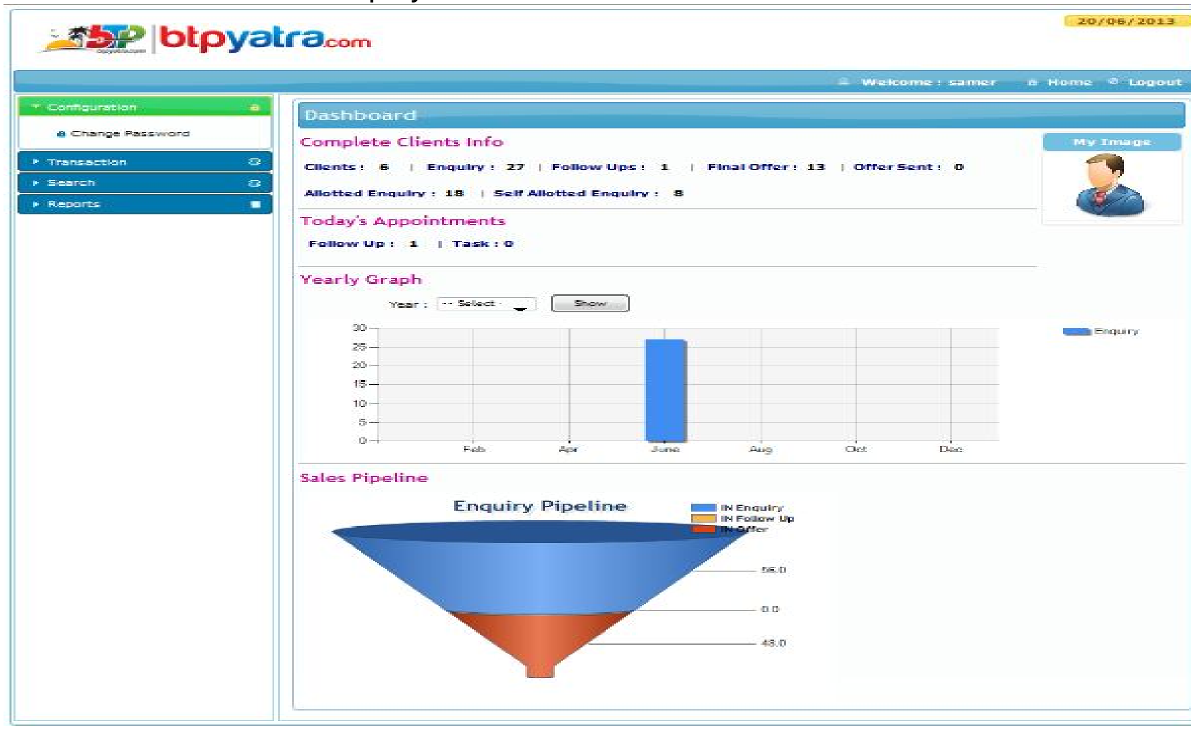


Fig: Employee Dashboard

• 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.

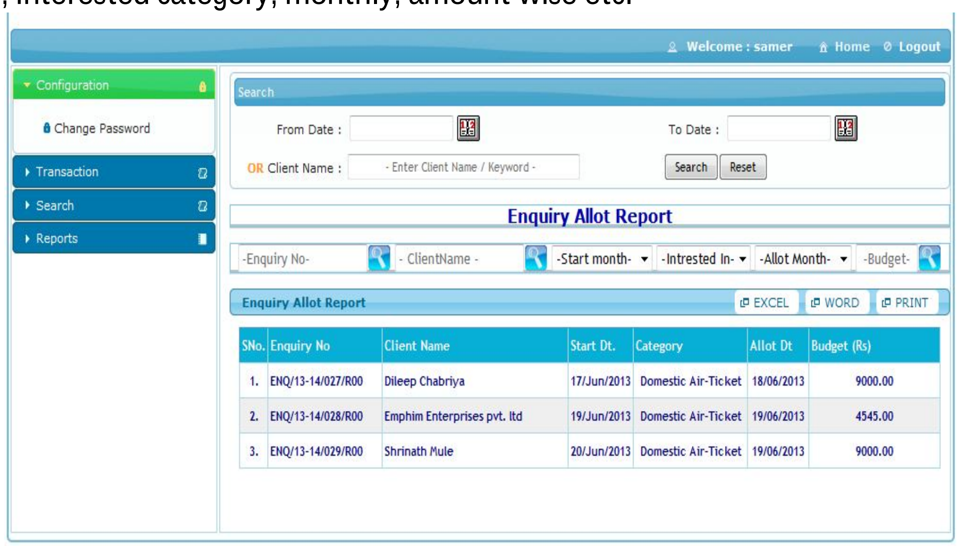


Fig: Employee Allot Report

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.

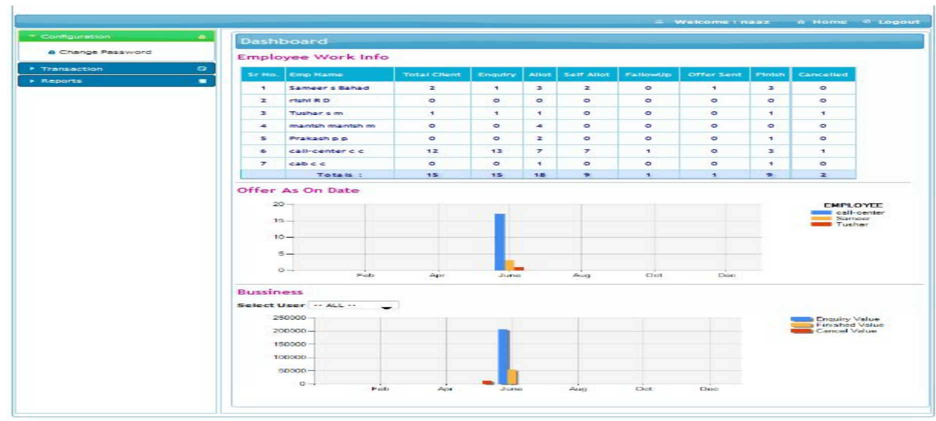


Fig: Management Dashboard

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.

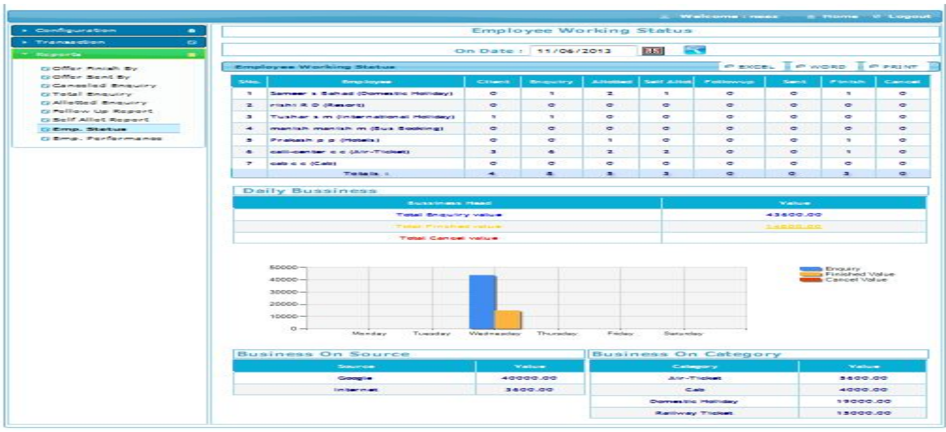


Fig: Daily Business Report

• 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.

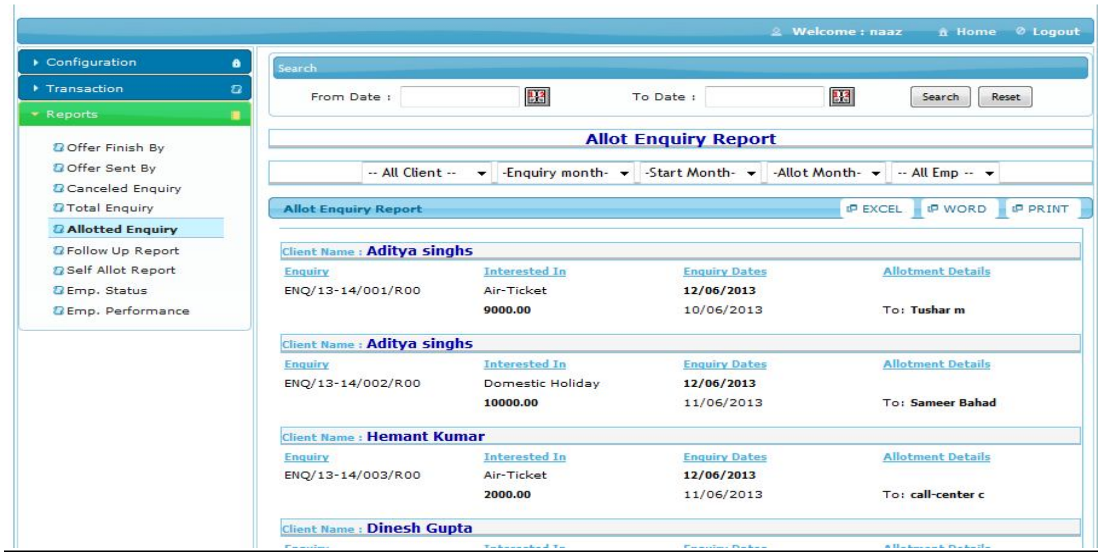


Fig: Allot Enquiry Report

Enquiry Details Report

On seraching 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, finshed on cost by which employee and final offer details.

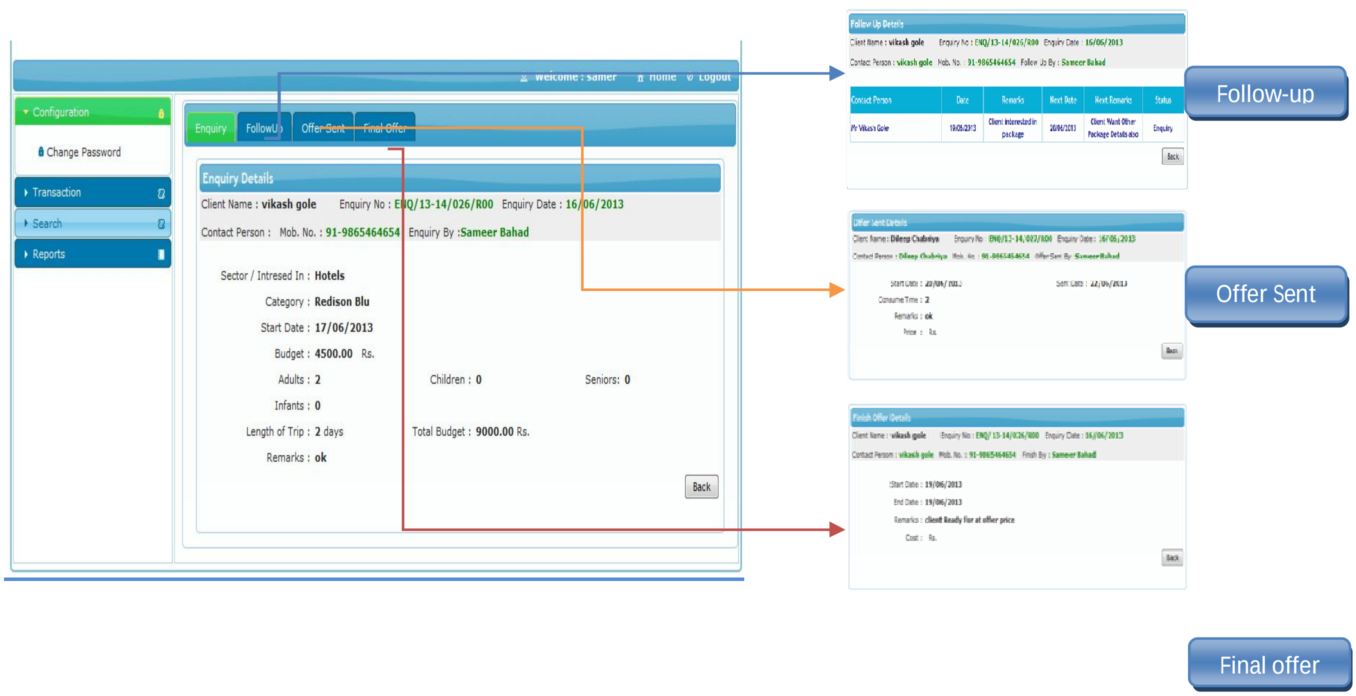


Fig: Enquiry Details Report

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.)

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