Shri Narayan INFOTECH
We care software automation of your environment

CRM (Customer Relationship Management)

(One of the module in the Business(BM) software)

Customer relationship management (CRM) is a term that refers to practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle, with the goal of improving business relationships with customers, assisting in customer retention and **DRIVING SALES GROWTH**. CRM systems are designed to compile information on customers across different channels -- or points of contact between the customer and the company -- which could include the company's website, telephone, direct mail, marketing materials and social media. CRM systems can also give customer-facing staff detailed information on customers' personal information, purchase history, buying preferences and concerns.

In the Business(BM) software we have give all the futures that can use to improve relationship with customer related to company product and with company. All the communication made with customer is retain and system and can be viewed any time while interact with customer. Following are the detail module available in the system for CRM

1. Databank (Database of customers/supplier)
2. Inquiry from the various sources
3. Inquiry follows up.
4. Inquiry Dropdown (Include dropdown reason)
5. Total Inquiry (City Wise, State Wise, Nation Wise, Date wise, Advertisement Media Wise, Sales Executive Wise)
6. Total Pending Inquiry (City Wise, State Wise, Nation Wise, Date wise, Advertisement Media Wise, Sales Executive Wise)
7. Total Dropdown Inquiry
8. Inquiry Convert to Quotation (Given Quotation / Performa Invoice)
9. Quotation Follow up
10. Quotation Dropdown (include dropdown Reason)
11. Total Quotation (City Wise, State Wise, Nation Wise, Date wise, Advertisement Media Wise, Sales Executive Wise)
12. Total Pending Quotation (City Wise, State Wise, Nation Wise, Date wise, Advertisement Media Wise, Sales Executive Wise)
13. Search party

    All Detail of above model is describe below

1. Databank (Database of customers/supplier)

In today's competitive market it is very difficult to find one single lead in the industries without any source, So main activity of Sales Team is lead generation from available resources. But it make very difficult to handle data without synchronization or all data available at one place.

In Business(BM) We have provided special future to collect data various sources and retain all data at one place i.e. Databank .

2. Inquiry Module (Add Inquiry from various sources)

Main activity of marketing department is to generate lead i.e. inquiry,
Inquiry can be received from various sources or new lead is generated by the relevant department.

Inquiry Follow up

Next step in the pre marketing is to follow up the inquiry, in this phase we need a proper detail each time what we talk with client, and date on which we need to talk with client or client give us date to contact. In this software we provide all the follow up detail in which you can include detail talk with client and next follow up date.

IF Inquiry is DROP DOWN.

It is possible and generally happen as per marketing rules, 50% chance that inquiry is drop down. So in such case the user is required to proceed for drop down inquiry. But here there is one more facilities and important tools is available, and it is dropdown inquiry with drop down reason. So in future base on these reasons company can work out for such reason and can reduce the drop down ratio. This can again boost and improve the image and sales of company.

Inquiry Report

Normally company is required data of inquiry for various purposes such as

1. If executive is visiting particular city, they have inquiry list so they can personally meet the person and convert inquiry into business.
2. Send invitation to all the parties in the particular cities or state, where company is do certain seminars, or take part in certain important Exhibition
3. And many more events where company representative can communicate with the prospect client and convert it to business.
4. Inquiry available from various resources or from media (i.e. Just dial, Indiamart etc...)
5. Drop down Inquiry detail
6. Find Ratio of Drop down inquiries for various reasons.

And many more combination for various options are available

3. Quotation

1. Add Quotation

a. Quotation can be added directly in the system with rate and quantity and financial term.
b. Quotation can be also generated with reference of inquiry previously entered in the system.
c. Performa invoice can also generated base on quotation

2. Follow up of Quotation

a. Follow up is also available in system with follow-up date and next follow-up date.
b. Follow up also contain communication done with client

3. Drop down Quotation

a. If Quotation is dropdown or cancelled due to some reason, entry is also done with such reasons.

4. Converted Quotation

a. If Quotation is converted i.e. Purchase order came from party , entry is also done.

5. Quotation Report

a. Quotation Report is also available with various parameters
    i. Date wise
    ii. Media / Reference wise
    iii. Sales Executive Wise
    iv. Follow up Detail
    v. Dropdown Reason wise
    vi. City Wise
b. Pending Quotation
    i. City wise
    ii. Sales executive wise
c. Drop Down Quotation
    i. City Wise
    ii. Sales Executive Wise
    iii. Dropdown reason wise
d. Converted Quotation
    i. Date wise
    ii. City Wise
    iii. Sales Executive Wise
    iv. Media / Reference Wise

4. Sale

1. Sale Order
2. Sale Order Report

5. Mass Mailing