

Highlights of the CRM Module

1. Levels of Users – Create Administrator, Managers, Executives
2. Assign Managers/Executives to Customers
3. Allows Administrator / Managers to set Targets for Executives – Customer wise and Item wise
4. Allows Administrator/ Manager/Executive to view achievements (Targets achieved) – Customer wise and Item wise
5. Executive Dashboard – Single window to view and/or record call details with individual Customers – including Monthly Targets and achievements
6. New Log option from the same window to record call details for any follow up with individual Customers
7. Option to close a call log on completion of the transaction
8. Option also to carry forward a call detail for a future date
9. Links from the dashboard to default reports of Tally – including Bill wise outstanding, Ledger details etc.
10. Executive Follow up Register – Single report to access the daily call recordings arranged chronologically – date wise with details of the Executive Name, Log Date & Time, Purpose of Call, Order Status, follow up details, follow up results etc.
11. Pending Follow up Calls – List of all the calls which have not been closed arranged chronologically – date wise
12. These reports have filters based on various parameters like Executive Name, Customer Name, Follow up Date, City, State, Product etc.
13. Daily Sales Report – Report of the sales done on a daily basis with details of the Date, Invoice No., Executive Name, Customer Name, Product, Quantity and Amount. Filters for Executive Name, Customer Name and Product
14. Separate Menus for Administrator, Manager and Executives to allow appropriate access to their data
15. Using Tally's remote access facility – allows users to log in remotely to view / add new logs and or reports
16. Various MIS Reports – like Customers having no sales transactions during a chosen period, Items which are not moving during a chosen period, Executive wise Targets and achievements report, Area wise Targets and achievements report
17. Further customization possibilities as per user requirements
18. Integrated and built on the Tally software platform using features available in the product and so easy to learn and use