
CRM – Administration Guide

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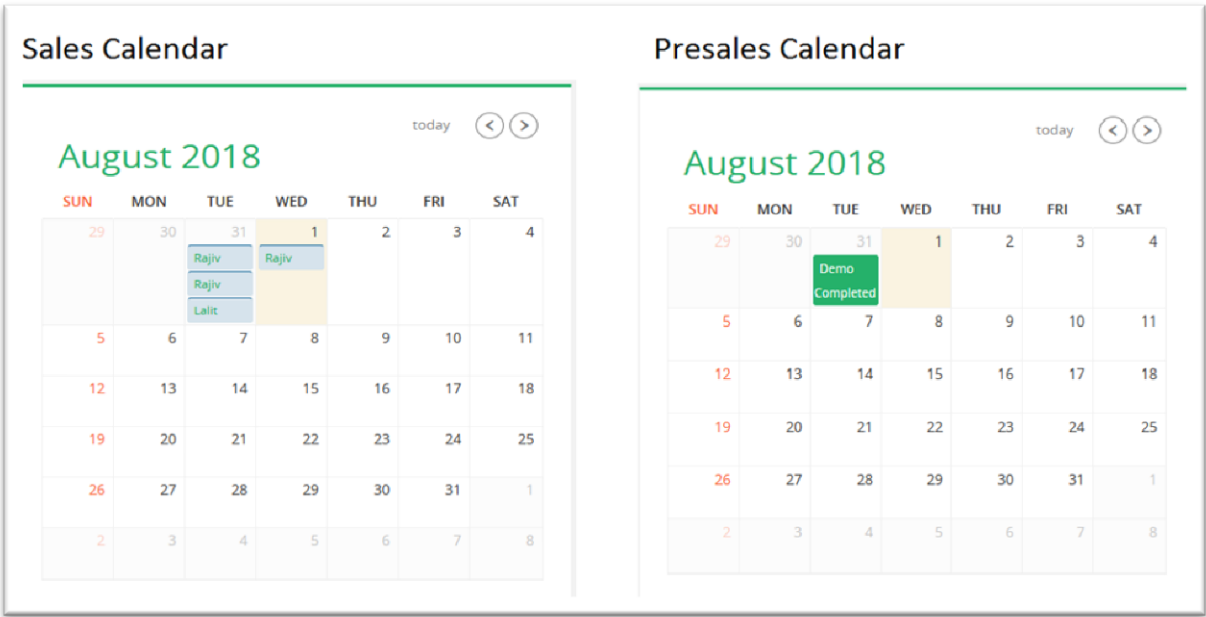
1. Overview

CRM is the developed for managing the Customers, their Products and the related Sales & Presales Tasks.

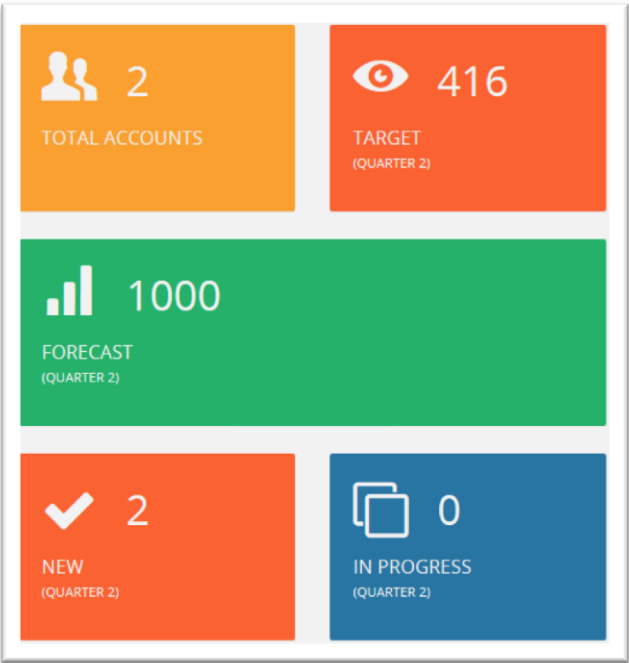
2. Dashboard

2.1.Calendar

Only Admin and Sales can see all the tasks in the Calendar.



2.2.Total Counts



3. Employee Management

Only Admin can Add/Edit/View/Disable Employees.

3.1.Add Employee

- Click on Employee Management in menu to navigate Employees List.
- To add employees click on Add Employee button from Employees List.

The screenshot shows the CRM interface with the 'Employees' list. The 'Add Employee' button is highlighted with a red box. The table below lists the current employees:

No	Name	Role	Territory	Designation	Mobile Number	Email Address	Username	Status	Action
1	Anoop Parakadavath	Sales Manager	South	Manager	9876543212	anoop.p@attunelive.com	anoop	Enabled	 
2	Prashant Dalvi	Sales Manager	West	General Manager	9876543211	prashant.d@attunelive.com	prashant	Enabled	 
3	Nikhil Kothari	Sales Head	International	Managing Director	9876543210	nikhil.k@attunelive.com	nikhil	Enabled	 

- Fill all the details and click on Submit button.

The screenshot shows the 'Add Employee' form in the CRM. The form fields are as follows:

- Role*: Select Role (dropdown)
- Territory*: Select Territory (dropdown)
- First Name*: First Name (text input)
- Last Name*: Last Name (text input)
- Designation*: Select Designation (dropdown)
- Mobile Number*: Mobile Number (text input)
- Email Address*: Email Address (text input)
- Username*: User Name (text input)
- Password*: Password (text input)
- Address*: Address (text area)

Buttons: Submit, Back

3.2.Edit Employee

To edit employee click on the Edit Icon



The screenshot shows the CRM interface with a sidebar on the left containing navigation links: Dashboard, Employee Management, Account Management, Target Management, Sales Documents, Presales Requests, Report Management, Master Management, and Audit Log. The main content area is titled 'Employees' and includes a search bar, a 'Refresh' button, and a table of employees. The table has columns for Name, Role, Territory, Designation, Mobile Number, Email Address, Username, Status, and Action. Three employees are listed: Anoop Parakadavath, Prashant Dalvi, and Nikhil Kothari. In the Action column for Anoop Parakadavath, the Edit icon (pencil) is highlighted with a red box.

Name	Role	Territory	Designation	Mobile Number	Email Address	Username	Status	Action
Anoop Parakadavath	Sales Manager	South	Manager	9876543212	anoop.p@attunelive.com	anoop	Enabled	
Prashant Dalvi	Sales Manager	West	General Manager	9876543211	prashant.d@attunelive.com	prashant	Enabled	
Nikhil Kothari	Sales Head	International	Managing Director	9876543210	nikhil.k@attunelive.com	nikhil	Enabled	

3.3.View Employee

To view employee click on the View Icon

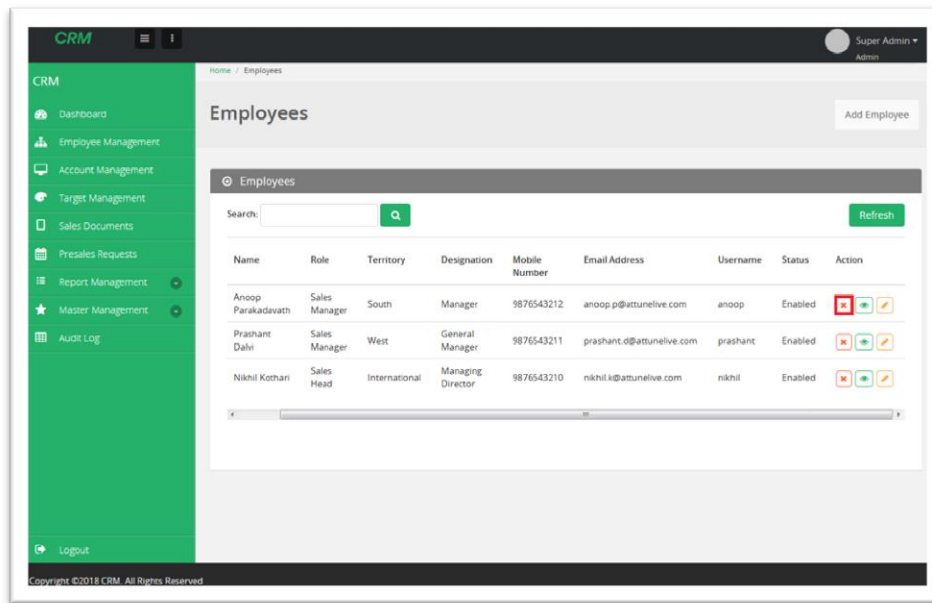


The screenshot shows the CRM interface with a sidebar on the left containing navigation links: Dashboard, Employee Management, Account Management, Target Management, Sales Documents, Presales Requests, Report Management, Master Management, and Audit Log. The main content area is titled 'Employees' and includes a search bar, a 'Refresh' button, and a table of employees. The table has columns for Name, Role, Territory, Designation, Mobile Number, Email Address, Username, Status, and Action. Three employees are listed: Anoop Parakadavath, Prashant Dalvi, and Nikhil Kothari. In the Action column for Anoop Parakadavath, the View icon (eye) is highlighted with a red box.

Name	Role	Territory	Designation	Mobile Number	Email Address	Username	Status	Action
Anoop Parakadavath	Sales Manager	South	Manager	9876543212	anoop.p@attunelive.com	anoop	Enabled	
Prashant Dalvi	Sales Manager	West	General Manager	9876543211	prashant.d@attunelive.com	prashant	Enabled	
Nikhil Kothari	Sales Head	International	Managing Director	9876543210	nikhil.k@attunelive.com	nikhil	Enabled	

3.4.Disable Employee

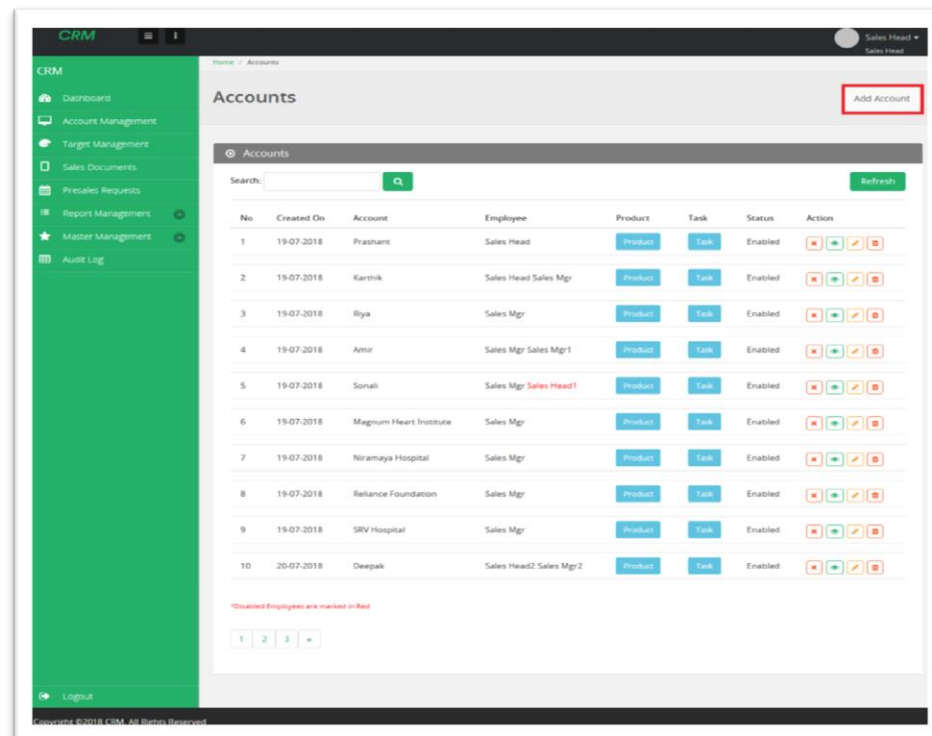
- To disable employee click on the Disable Icon 
- While disabling employee Admin can assign other Employee (only the employee from same Territory).



4. Account Management

4.1.Add Account

- Click on Account Management to navigate to the Accounts List.
- To add account click on Add Account button from Accounts List.



- c. Fill the details in the Add Account page and click on Submit button.
- A Sales Head can select any Employee with the selected Territory
 - A Sales Manager gets Territory and Employee field disabled. Employee field is prefilled with the logged in user

CRM

Home / Accounts / Add Account

Add Account

Back

Account Information

Territory*

Employee*

Account Name*

Business Model*

Specialty*

Number of Beds/Samples Processed*

Size*

Address 1*

Address 2

Country*

State*

City*

Pincode*

Software Used*

Lead Source*

Account Status*

Contact Information

[Add Contact](#)

No Contact Found

Additional Remarks

Status*

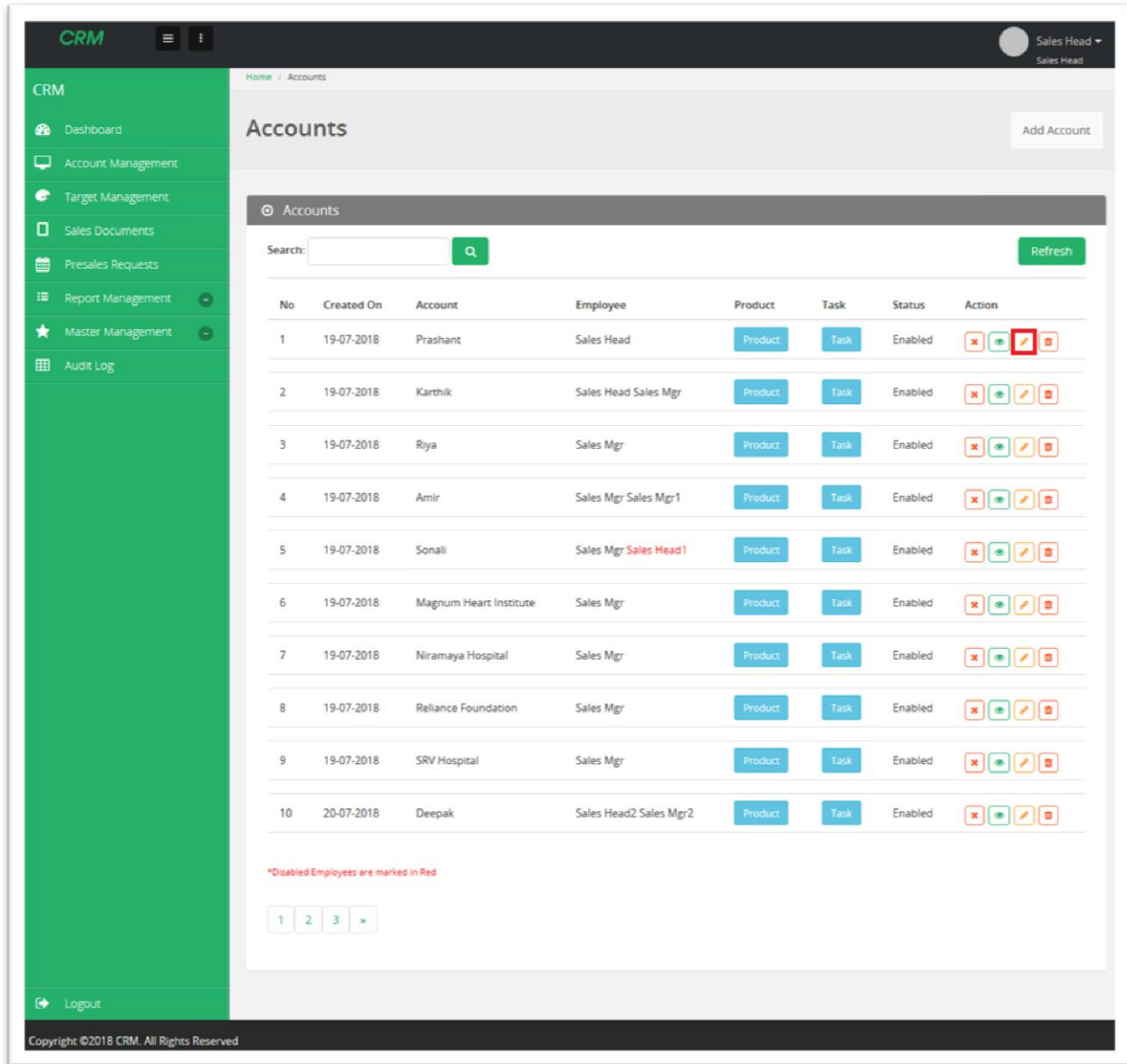
[Submit](#) [Back](#)

[Logout](#)

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4.2.Edit Account

- a. To edit account click on the Edit Icon of the Account 
 - i. A Sales Head can edit all the Accounts presented
 - ii. A Sales Manager can edit only the Accounts mapped with him/her



The screenshot displays the CRM Accounts management page. The sidebar on the left contains navigation links: Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, Report Management, Master Management, and Audit Log. The main content area shows a table of accounts. The table has columns for No, Created On, Account, Employee, Product, Task, Status, and Action. The Action column contains icons for delete, enable, edit, and disable. The 'Edit' icon (pencil) is highlighted for the first account (Prashant). The interface also includes a search bar, a refresh button, and a footer with the text 'Copyright ©2018 CRM. All Rights Reserved'.

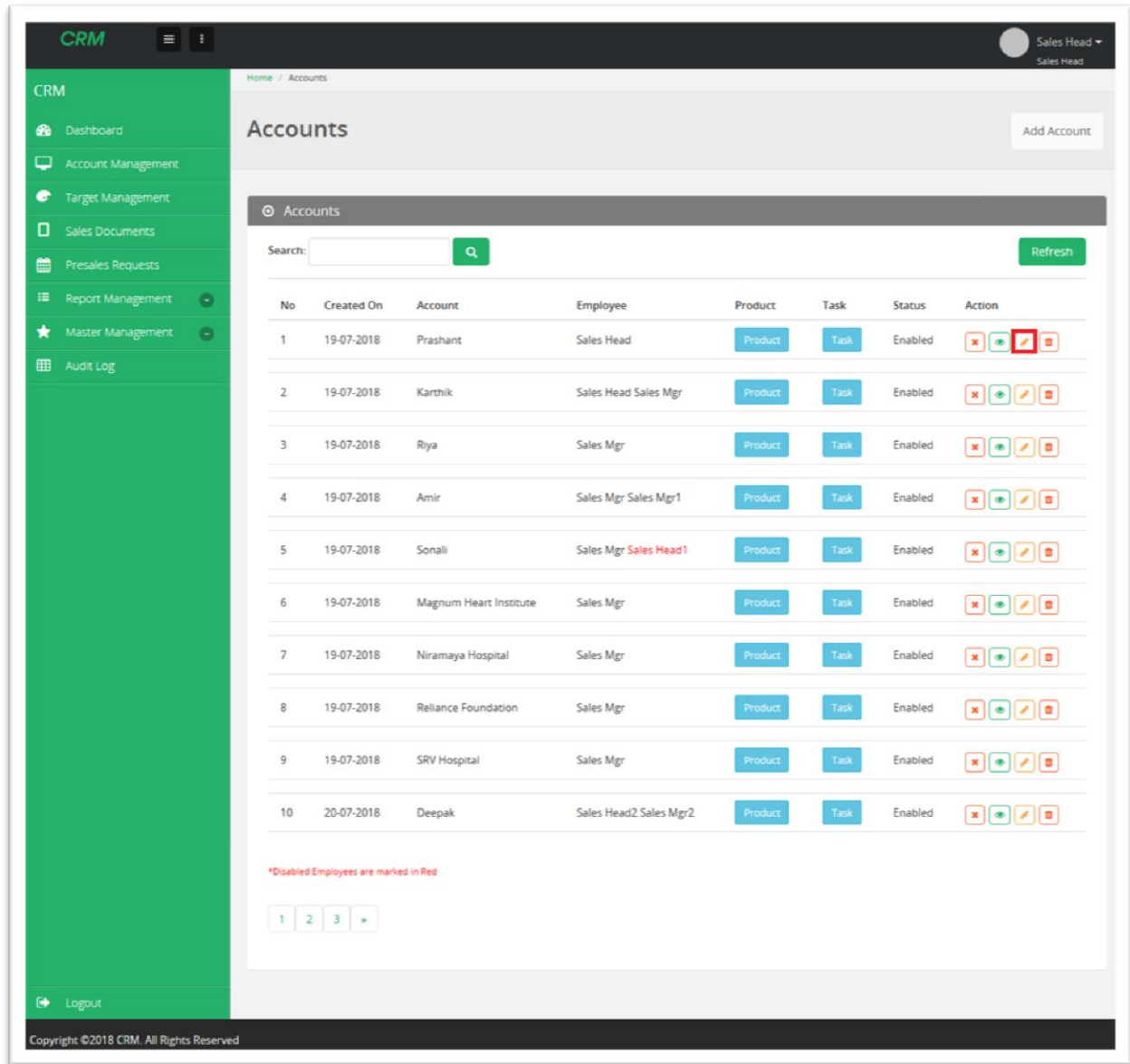
No	Created On	Account	Employee	Product	Task	Status	Action
1	19-07-2018	Prashant	Sales Head	Product	Task	Enabled	   
2	19-07-2018	Karthik	Sales Head Sales Mgr	Product	Task	Enabled	   
3	19-07-2018	Riya	Sales Mgr	Product	Task	Enabled	   
4	19-07-2018	Amir	Sales Mgr Sales Mgr1	Product	Task	Enabled	   
5	19-07-2018	Sonali	Sales Mgr Sales Head1	Product	Task	Enabled	   
6	19-07-2018	Magnum Heart Institute	Sales Mgr	Product	Task	Enabled	   
7	19-07-2018	Niramaya Hospital	Sales Mgr	Product	Task	Enabled	   
8	19-07-2018	Reliance Foundation	Sales Mgr	Product	Task	Enabled	   
9	19-07-2018	SRV Hospital	Sales Mgr	Product	Task	Enabled	   
10	20-07-2018	Deepak	Sales Head2 Sales Mgr2	Product	Task	Enabled	   

*Disabled Employees are marked in Red

1 2 3 »

4.3.View Account

- a. To view account click on the View Icon 
- A Sales Head can view all the Accounts presented
 - A Sales Manager can view only the Accounts mapped with him/her



CRM Accounts

Search:  Refresh

No	Created On	Account	Employee	Product	Task	Status	Action
1	19-07-2018	Prashant	Sales Head	Product	Task	Enabled	   
2	19-07-2018	Karthik	Sales Head Sales Mgr	Product	Task	Enabled	   
3	19-07-2018	Riya	Sales Mgr	Product	Task	Enabled	   
4	19-07-2018	Amir	Sales Mgr Sales Mgr1	Product	Task	Enabled	   
5	19-07-2018	Sonali	Sales Mgr Sales Head1	Product	Task	Enabled	   
6	19-07-2018	Magnum Heart Institute	Sales Mgr	Product	Task	Enabled	   
7	19-07-2018	Niramaya Hospital	Sales Mgr	Product	Task	Enabled	   
8	19-07-2018	Reliance Foundation	Sales Mgr	Product	Task	Enabled	   
9	19-07-2018	SRV Hospital	Sales Mgr	Product	Task	Enabled	   
10	20-07-2018	Deepak	Sales Head2 Sales Mgr2	Product	Task	Enabled	   

*Disabled Employees are marked in Red

1 2 3 »

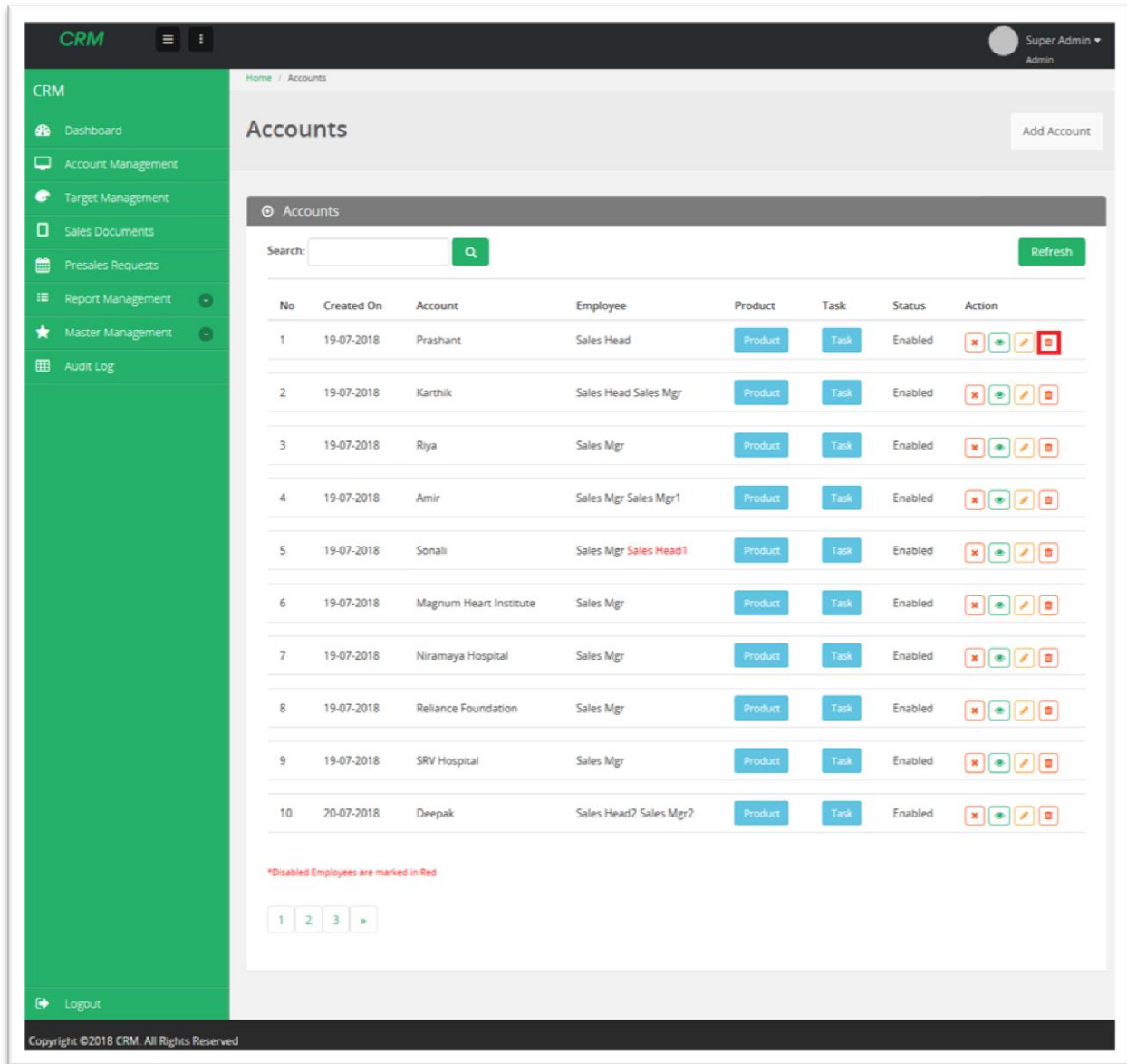
Logout

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4.4.Delete Account

Only Admin and Sales Head can delete accounts.

- a. To delete account click on Delete Icon 



The screenshot displays the CRM Accounts management page. The left sidebar contains navigation links: Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, Report Management, Master Management, and Audit Log. The main content area shows a table of accounts. The table has columns: No, Created On, Account, Employee, Product, Task, Status, and Action. The 'Action' column contains icons for delete, edit, and other functions. The 'Delete' icon is highlighted in red for the first account (Prashant).

No	Created On	Account	Employee	Product	Task	Status	Action
1	19-07-2018	Prashant	Sales Head	Product	Task	Enabled	   
2	19-07-2018	Karthik	Sales Head Sales Mgr	Product	Task	Enabled	   
3	19-07-2018	Riya	Sales Mgr	Product	Task	Enabled	   
4	19-07-2018	Amir	Sales Mgr Sales Mgr1	Product	Task	Enabled	   
5	19-07-2018	Sonali	Sales Mgr Sales Head1	Product	Task	Enabled	   
6	19-07-2018	Magnum Heart Institute	Sales Mgr	Product	Task	Enabled	   
7	19-07-2018	Niramaya Hospital	Sales Mgr	Product	Task	Enabled	   
8	19-07-2018	Reliance Foundation	Sales Mgr	Product	Task	Enabled	   
9	19-07-2018	SRV Hospital	Sales Mgr	Product	Task	Enabled	   
10	20-07-2018	Deepak	Sales Head2 Sales Mgr2	Product	Task	Enabled	   

*Disabled Employees are marked in Red

1 2 3 »

- b. Admin and Sales Head can Delete Account only if the account is not mapped with any products or tasks.

4.5.Add Product

- a. Click on Product button from Accounts List to get the Product List Page.

The screenshot shows the CRM interface with the 'Accounts' page. The left sidebar contains the CRM menu. The main content area displays a table of accounts. The 'Product' column has a red box around the 'Product' button for the first account (Prashant). The table has columns: No, Created On, Account, Employee, Product, Task, Status, and Action.

No	Created On	Account	Employee	Product	Task	Status	Action
1	19-07-2018	Prashant	Sales Head	Product	Task	Enabled	[Icons]
2	19-07-2018	Karthik	Sales Head Sales Mgr	Product	Task	Enabled	[Icons]
3	19-07-2018	Riya	Sales Mgr	Product	Task	Enabled	[Icons]
4	19-07-2018	Amir	Sales Mgr Sales Mgr1	Product	Task	Enabled	[Icons]
5	19-07-2018	Sonali	Sales Mgr Sales Head1	Product	Task	Enabled	[Icons]
6	19-07-2018	Magnum Heart Institute	Sales Mgr	Product	Task	Enabled	[Icons]
7	19-07-2018	Niramaya Hospital	Sales Mgr	Product	Task	Enabled	[Icons]
8	19-07-2018	Reliance Foundation	Sales Mgr	Product	Task	Enabled	[Icons]
9	19-07-2018	SRV Hospital	Sales Mgr	Product	Task	Enabled	[Icons]
10	20-07-2018	Deepak	Sales Head2 Sales Mgr2	Product	Task	Enabled	[Icons]

*Disabled Employees are marked in Red

- b. Click on Add Product button from Products List.

The screenshot shows the CRM interface with the 'Products (Prashant)' page. The left sidebar contains the CRM menu. The main content area displays a table of products. The 'Add Product' button is highlighted with a red box. The table has columns: No, Product, Employee, Proposal Attachment, Amount Quoted, Budget Value, Time to Decide, Additional Information, and Stage.

No	Product	Employee	Proposal Attachment	Amount Quoted	Budget Value	Time to Decide	Additional Information	Stage
1	HIS	Sales Head	2057921811589a1.jpeg	120	101	180	Additional information	Cold
2	Spectra	Sales Head			152	15	Adtnal info	Cold
3	ClaimBook	Sales Head	untitled.png	100	123	165	ai	Close-Won
4	LIMS	Sales Head			100	15	Additional Information	Cold

- c. Fill all the details and click on Submit button.
 - i. A Sales Head can add products for multiple employees who is mapped with single account
 - ii. A Sales Manager gets Employee field disabled. Employee field is prefilled with the logged in user and can add product for account who is mapped with him/her

The screenshot shows the 'Add Product (Prashant)' form in the CRM system. The form is titled 'Add Product (Prashant)' and has a 'Back' button in the top right corner. The form fields are as follows:

- Employee*: Select Employee (dropdown)
- Product*: Select Product (dropdown)
- Model*: Select Model (dropdown)
- Proposal Submitted*: Select Proposal Submitted (dropdown)
- Budget Value*: Budget Value (text input)
- Time to Decide(Days)*: Select Time to Decide (dropdown)
- Additional Information*: (text area)
- Stage*: Select Stage (dropdown)
- Status*: Select Status (dropdown)

At the bottom of the form, there are two buttons: a green 'Submit' button and a grey 'Back' button. The CRM sidebar on the left shows various navigation options like Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, Report Management, Master Management, and Audit Log. The top right corner shows the user is logged in as 'Sales Head'.

4.6.Edit Product

- a. To edit product click on the Edit Icon 
 - i. A Sales Head, if the account is mapped with multiple employees then user can edit all the products which is mapped with account
 - ii. A Sales Manager can edit products which is only mapped with him/her

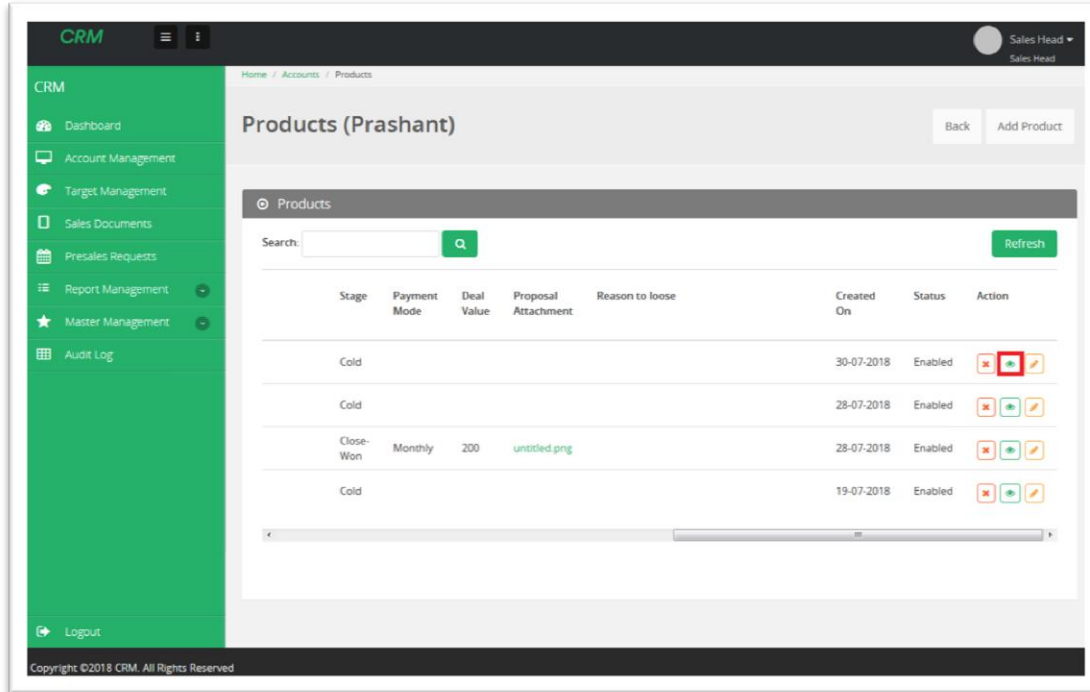
The screenshot shows the 'Products (Prashant)' table in the CRM system. The table has a search bar and a 'Refresh' button. The table columns are: Stage, Payment Mode, Deal Value, Proposal Attachment, Reason to loose, Created On, Status, and Action. The table contains four rows of product data.

Stage	Payment Mode	Deal Value	Proposal Attachment	Reason to loose	Created On	Status	Action
Cold					30-07-2018	Enabled	  
Cold					28-07-2018	Enabled	  
Close-Won	Monthly	200	untitled.png		28-07-2018	Enabled	  
Cold					19-07-2018	Enabled	  

The CRM sidebar on the left shows various navigation options like Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, Report Management, Master Management, and Audit Log. The top right corner shows the user is logged in as 'Sales Head'.

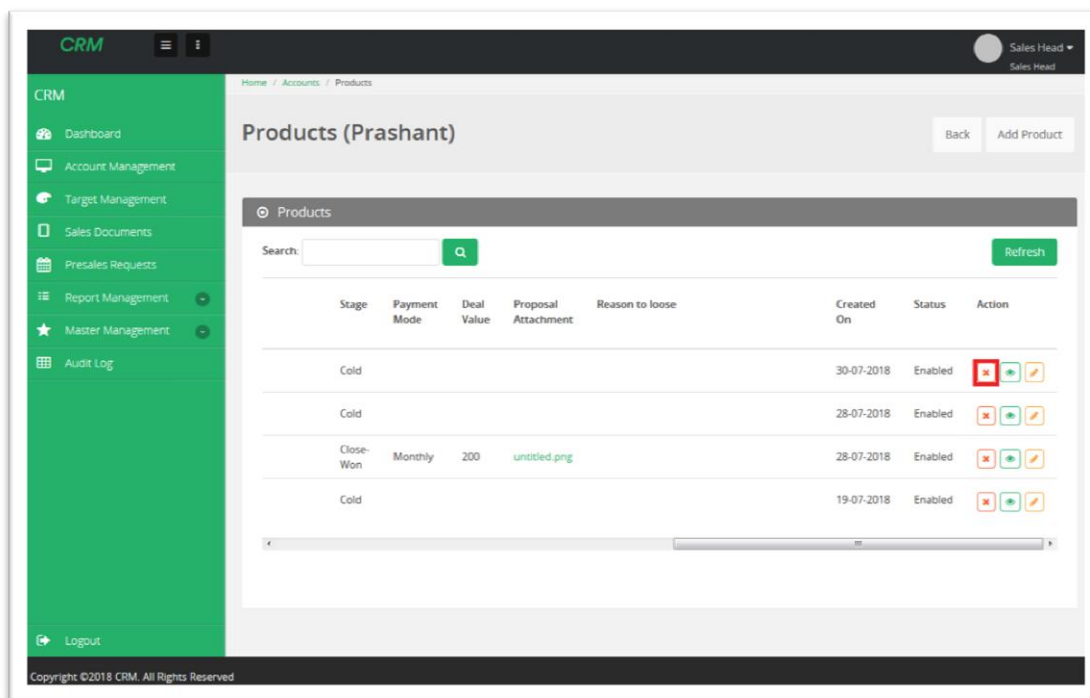
4.7.View Product

- a. To view product click on the View Icon 



4.8.Enable/Disable Product

Only Sales Head can Enable/Disable the product. This operation is allowed only when the Product is not mapped with Tasks.



4.9.Add Task

- a. Click on Task button from Accounts List to get Task List Page.
 - i. Sales Team can add tasks only when the account is mapped with product

CRM Accounts

Search: Refresh

No	Created On	Account	Employee	Product	Task	Status	Action
1	19-07-2018	Prashant	Sales Head	Product	Task	Enabled	
2	19-07-2018	Karthik	Sales Head Sales Mgr	Product	Task	Enabled	
3	19-07-2018	Riya	Sales Mgr	Product	Task	Enabled	
4	19-07-2018	Amir	Sales Mgr Sales Mgr1	Product	Task	Enabled	
5	19-07-2018	Sonali	Sales Mgr Sales Head1	Product	Task	Enabled	
6	19-07-2018	Magnum Heart Institute	Sales Mgr	Product	Task	Enabled	
7	19-07-2018	Niramaya Hospital	Sales Mgr	Product	Task	Enabled	
8	19-07-2018	Reliance Foundation	Sales Mgr	Product	Task	Enabled	
9	19-07-2018	SRV Hospital	Sales Mgr	Product	Task	Enabled	
10	20-07-2018	Deepak	Sales Head2 Sales Mgr2	Product	Task	Enabled	

*Disabled Employees are marked in Red

1 2 3 *

- b. In Task List Page click on Add Task button to fill details.

CRM Tasks (Prashant)

Back Add Task

Search: Refresh

No	Employee	Product	Task Date	Follow Up Date	Follow Up Task	Proposal Attachment	Follow Up Status	Follow Up Task Remarks
1	Sales Head	LIMS	31-07-2018	31-07-2018	Phone Call		New	testby agni
2	Sales Head	Spectra	31-07-2018	01-08-2018	Negotiations		In Progress	remark
3	Sales Head	LIMS	30-07-2018	30-07-2018	Phone Call		New	test
4	Sales Head	HIS	30-07-2018	31-07-2018	Phone Call		New	remarks
5	Sales Head	HIS	30-07-2018	30-07-2018	Phone Call		New	remar
6	Sales Head	ClaimBook	29-07-2018	30-07-2018	Proposal		Closed	remmarks
7	Sales Head	ClaimBook	28-07-2018	29-07-2018	Proposal		Closed	remarks
8	Sales Head	LIMS	19-07-2018	20-07-2018	Closure Meeting	anvi.pdf	Closed	Remarkss
9	Sales Head	LIMS	19-07-2018	20-07-2018	Phone Call		Closed	Remarks

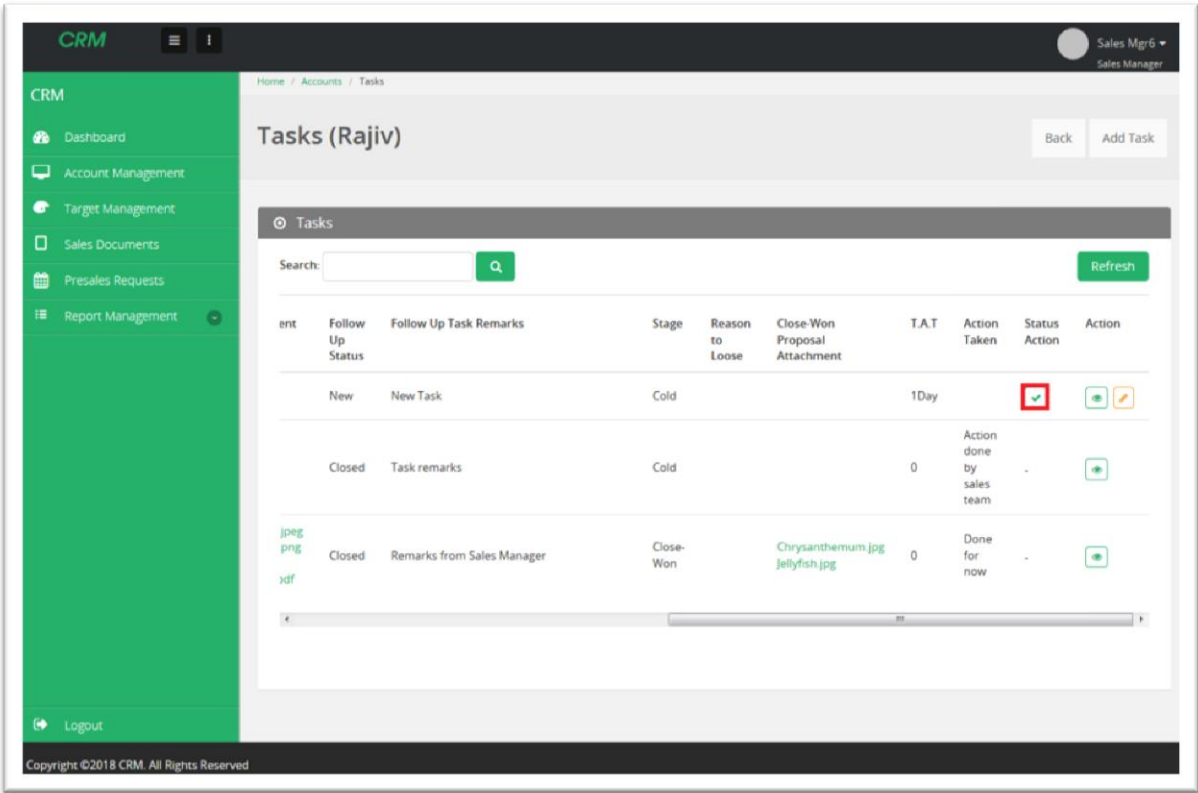
- c. Fill all the details and click on Submit button.
 - i. A Sales Head can add products for multiple employees who is mapped with single account
 - ii. A Sales Manager gets Employee field is disabled. Employee field is prefilled with the logged in user and can add task for account who is mapped with him/her

4.10. Edit Task

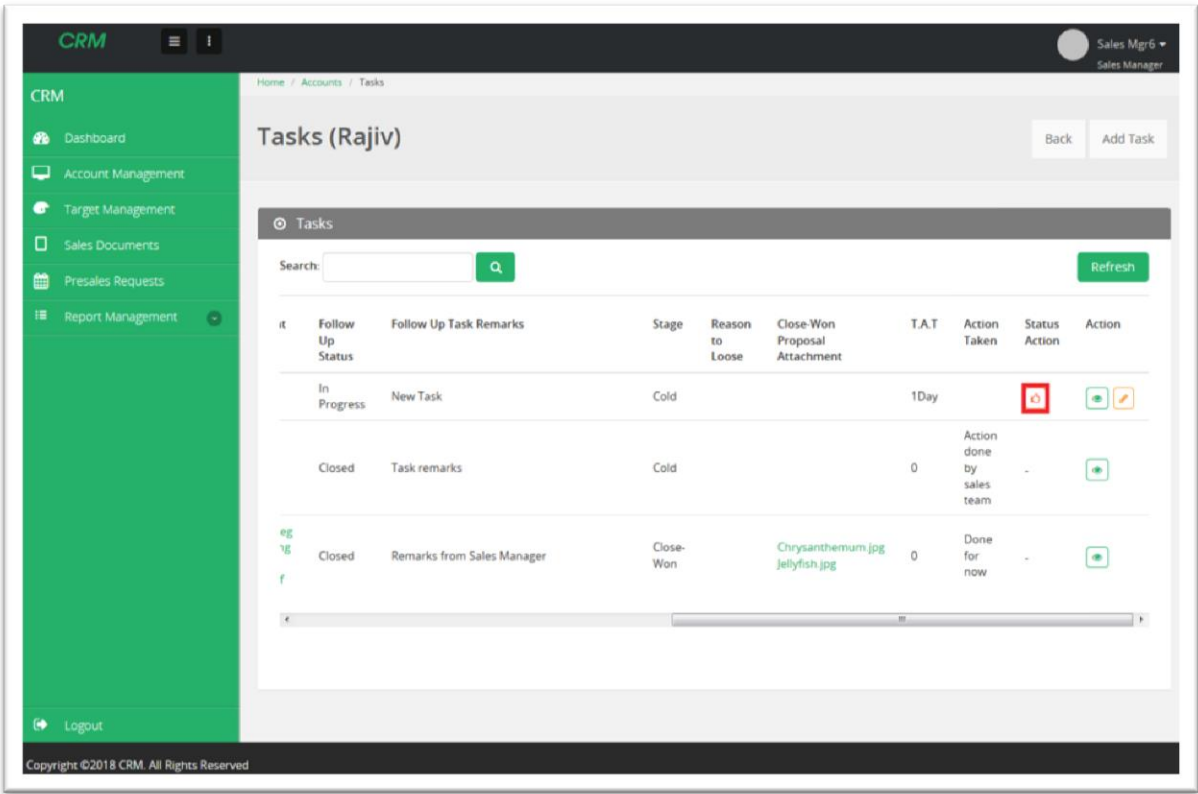
- a. To edit task click on the Edit Icon 

ent	Follow Up Status	Follow Up Task Remarks	Stage	Reason to Loose	Close-Won Proposal Attachment	T.A.T	Action Taken	Status Action	Action
New	New Task		Cold			1Day		✓	
Closed	Task remarks		Cold			0	Action done by sales team		
  	Closed	Remarks from Sales Manager	Close-Won		 	0	Done for now		

- b. To change Status Action from New to In Progress click on the In Progress Icon  in the Task List.



- c. To change from In Progress to Closed click on the Closed Icon  in the Task List.



d. Also can edit Status Action in Edit Task.

The screenshot shows the 'Edit Task' form in the CRM application. The form is titled 'Edit Task' and has a 'Back' button in the top right corner. The form fields are as follows:

- Employee*: Sales Mgr6
- Product*: LIMS
- Task Date*: 01-08-2018
- Follow Up Date*: 03-08-2018
- Follow Up Task*: Phone Call
- Follow Up Task Status*: In Progress (highlighted with a red rectangle)
- Stage*: Cold
- Remarks*: New Task

At the bottom of the form, there are 'Submit' and 'Back' buttons. The CRM sidebar on the left shows various navigation options like Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, and Report Management. The footer indicates 'Copyright ©2018 CRM. All Rights Reserved'.

4.11. View Task

a. To view product click on the View Icon

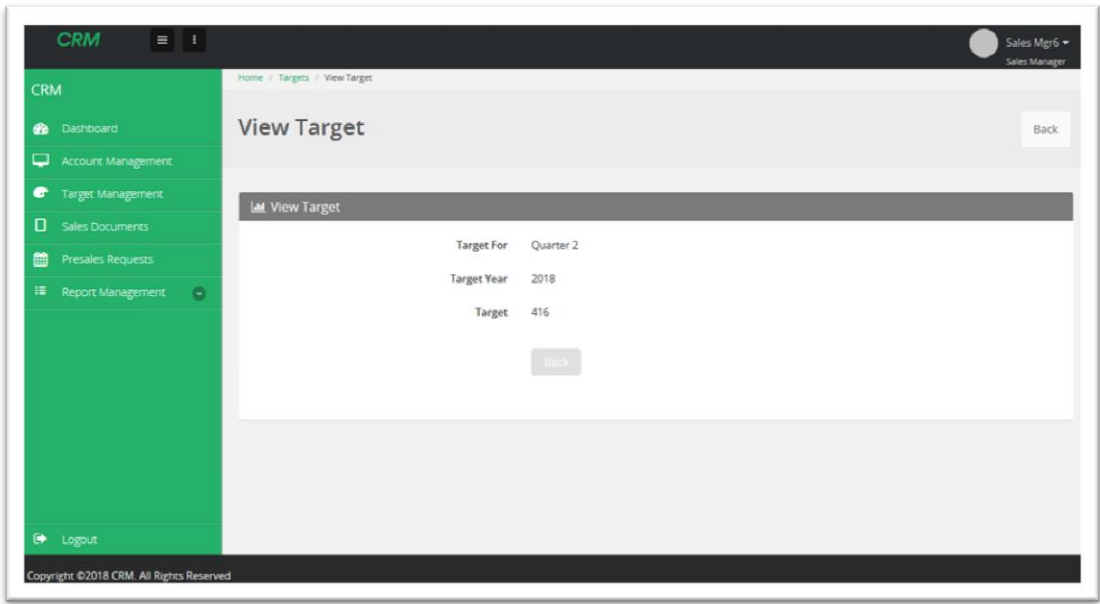
The screenshot shows the 'Tasks (Rajiv)' view in the CRM application. It features a search bar, a 'Refresh' button, and a table of tasks. The table has the following columns: Follow Up Status, Follow Up Task Remarks, Stage, Reason to Loose, Close-Won Proposal Attachment, TAT, Action Taken, Status Action, and Action. The data rows are as follows:

Follow Up Status	Follow Up Task Remarks	Stage	Reason to Loose	Close-Won Proposal Attachment	TAT	Action Taken	Status Action	Action
New	New Task	Cold			1Day		✓	✗
Closed	Task remarks	Cold			0	Action done by sales team		✗
Closed	Remarks from Sales Manager	Close-Won		Chrysanthemum.jpg, jellyfish.jpg	0	Done for now		✗

The CRM sidebar on the left shows various navigation options like Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, and Report Management. The footer indicates 'Copyright ©2018 CRM. All Rights Reserved'.

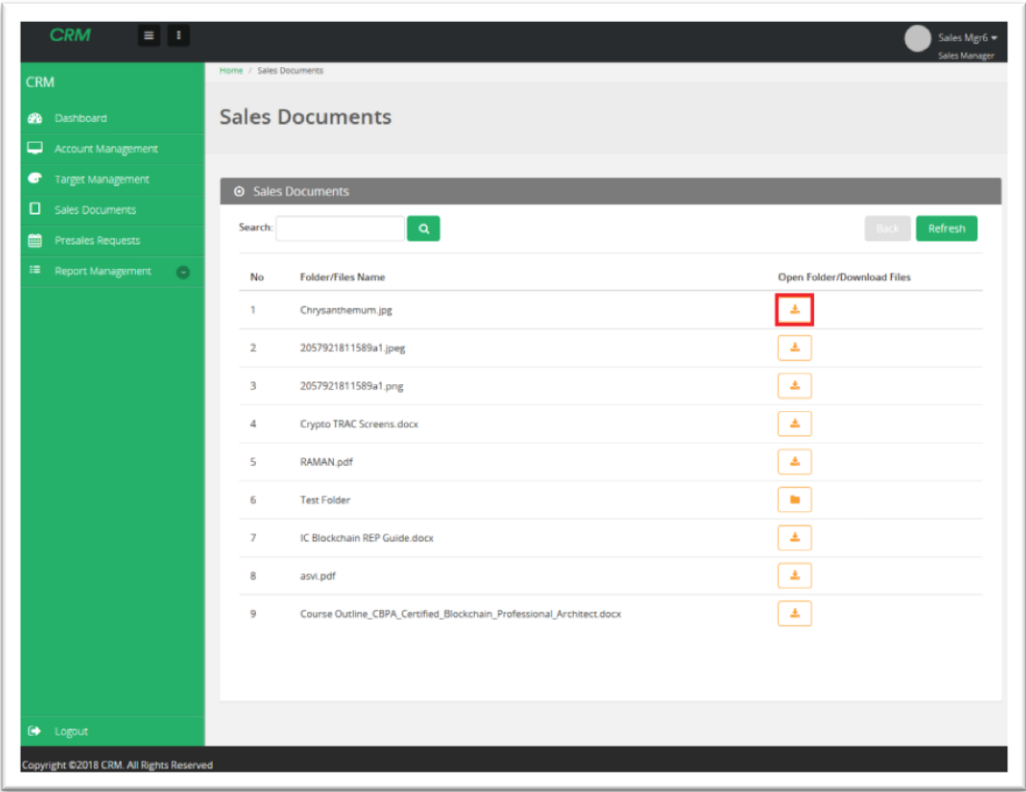
5. Target Management

- a. Click on Target Management to navigate to the Targets List.
- b. Sales Head can Add/Edit/View targets and Sales Manager can only View targets by clicking on the View Icon 



6. Sales Documents

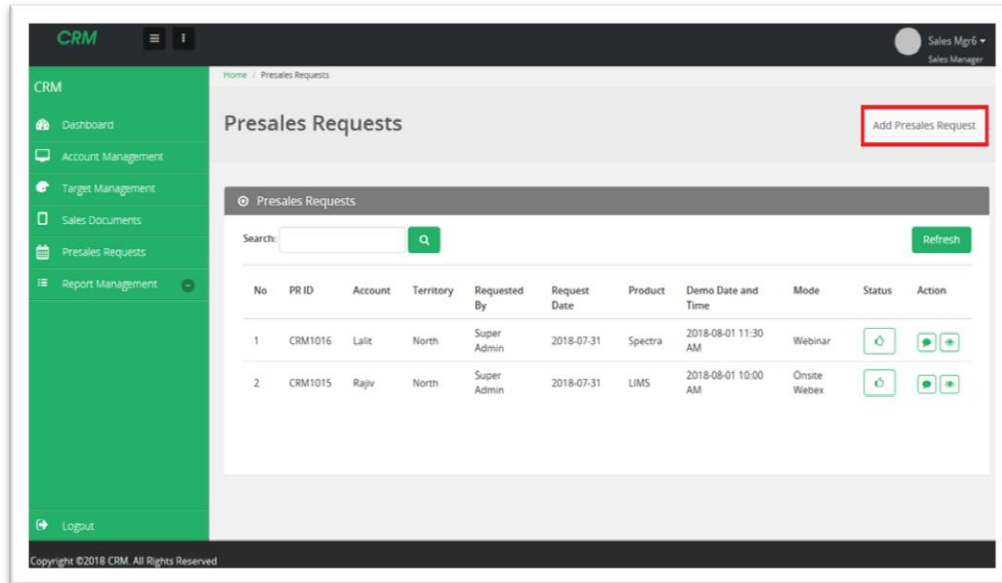
- a. Sales Head can Create Folder and Upload Files. Sales Manager can Open Folder/Download Files by clicking on 



7. Presales Requests

7.1.Add Presales Requests

- a. To add presales requests click on Add Presales Request button.



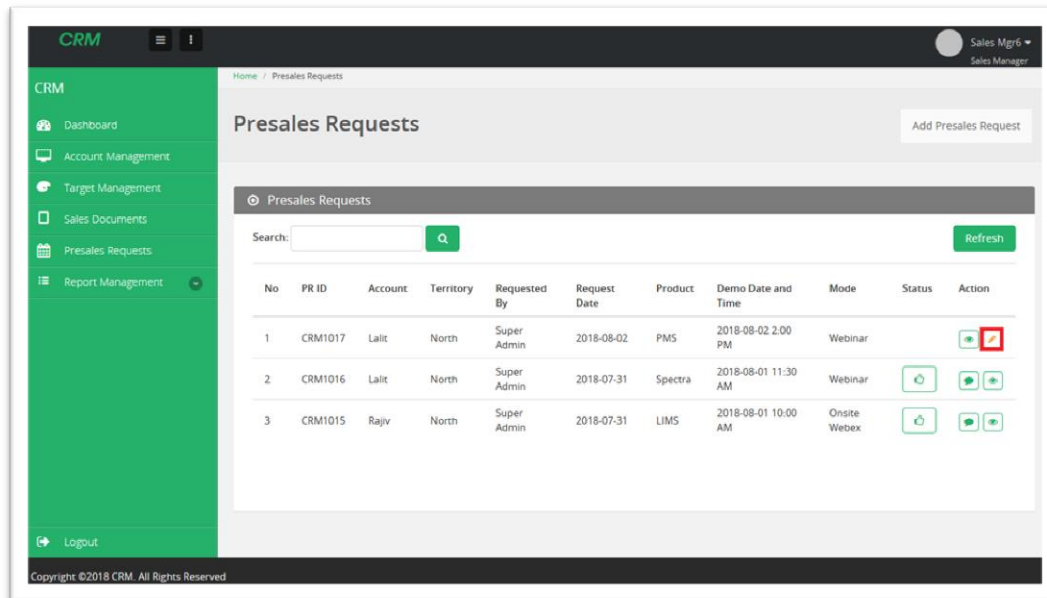
- b. While assigning Sales SPOC

- A Sales Head can assign any sales team member as Sales SPOC
- A Sales Manager gets Sales SPOC field is disabled. Sales SPOC field is prefilled with the logged in user

The screenshot shows the 'Add Presales Request' form in the CRM. The form includes fields for Account, Territory, Business Model, Date of Request, Customer Attendees and Designation, Product, Date of Demo with Time, Mode of Demo, Demo Link (if applicable), Sales SPOC, Sales First level Demo done, What Customer is looking for / Current Challenges, and Sales Comments. The 'Sales SPOC' field is highlighted with a red box.

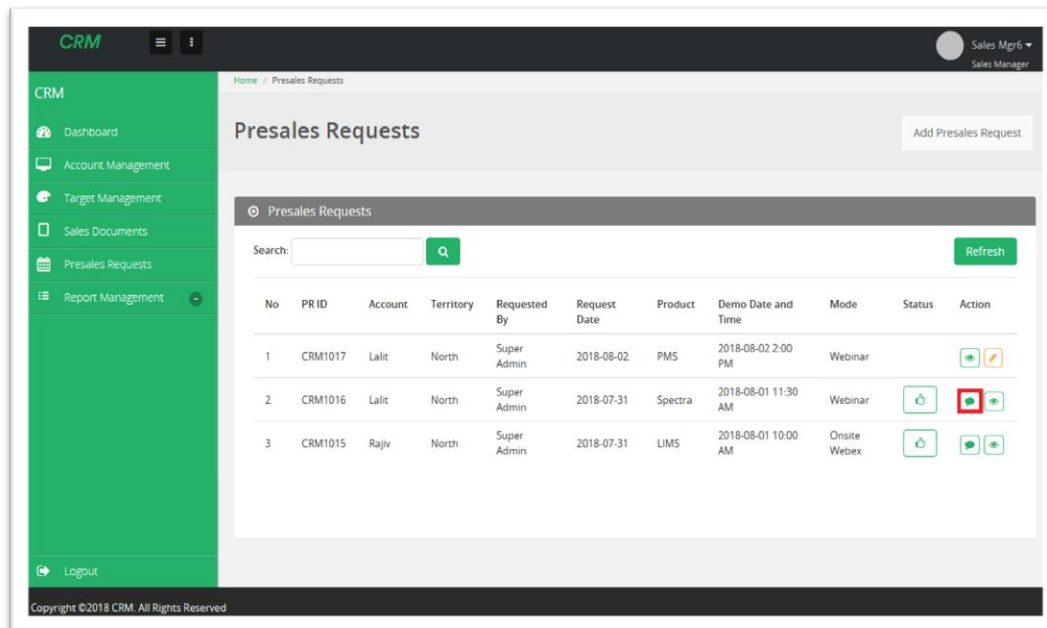
7.2.Edit Presales Request

- a. To edit presales request click on the Edit Icon 



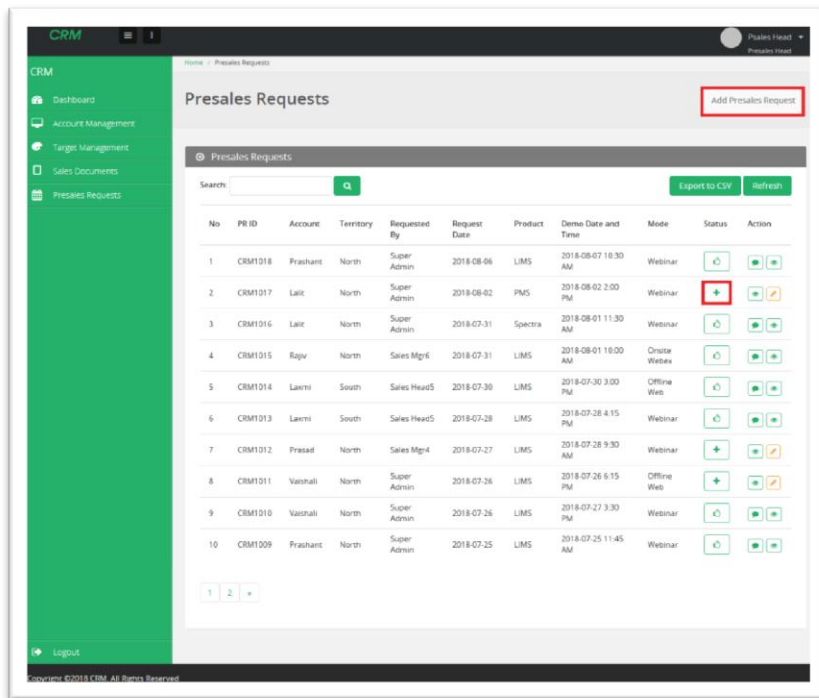
7.3.Add Sales Comments

- a. To add sales comments click on Sales Comments icon  Sales Comments icon will enabled only after the Demo Completion.



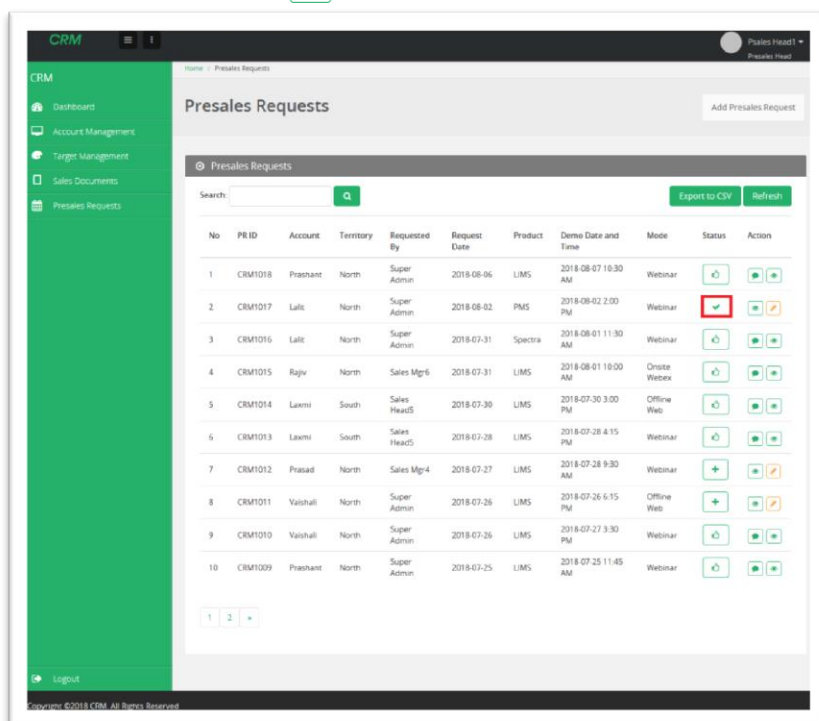
7.4.Assign Presales Demo SPOC

- To assign presales demo SPOC click on the Assign Icon 
- Only Admin and Presales Head can assign Presales Demo SPOC.



7.5.Demo Completed

- Admin, Presales Head and assigned Presales SPOC can change status as Demo Completed by clicking on the Demo Completed Icon 



b. After demo completion icon will change as 

CRM

Dashboard

Account Management

Target Management

Sales Documents

Presales Requests

Home / Presales Requests

Presales Requests

Add Presales Request

Presales Requests

Search: Q Export to CSV Refresh

No	PR ID	Account	Territory	Requested By	Request Date	Product	Demo Date and Time	Mode	Status	Action
1	CRM1018	Prashant	North	Super Admin	2018-08-06	LIMS	2018-08-07 10:30 AM	Webinar		 
2	CRM1017	Lalit	North	Super Admin	2018-08-02	PMS	2018-08-02 2:00 PM	Webinar		 
3	CRM1016	Lalit	North	Super Admin	2018-07-31	Spectra	2018-08-01 11:30 AM	Webinar		 
4	CRM1015	Rajiv	North	Sales Mgr6	2018-07-31	LIMS	2018-08-01 10:00 AM	Onsite Webex		 
5	CRM1014	Laxmi	South	Sales Head5	2018-07-30	LIMS	2018-07-30 3:00 PM	Offline Web		 
6	CRM1013	Laxmi	South	Sales Head5	2018-07-28	LIMS	2018-07-28 4:15 PM	Webinar		 
7	CRM1012	Prasad	North	Sales Mgr4	2018-07-27	LIMS	2018-07-28 9:30 AM	Webinar		 
8	CRM1011	Vaishali	North	Super Admin	2018-07-26	LIMS	2018-07-26 6:15 PM	Offline Web		 
9	CRM1010	Vaishali	North	Super Admin	2018-07-26	LIMS	2018-07-27 3:30 PM	Webinar		 
10	CRM1009	Prashant	North	Super Admin	2018-07-25	LIMS	2018-07-25 11:45 AM	Webinar		 

1 2 »

Logout

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c. After demo completion comment icon will enable. Presales Team can give comment by clicking on the Comment Icon 

CRM

Dashboard

Account Management

Target Management

Sales Documents

Presales Requests

Home / Presales Requests

Presales Requests

Add Presales Request

Presales Requests

Search: Q Export to CSV Refresh

No	PR ID	Account	Territory	Requested By	Request Date	Product	Demo Date and Time	Mode	Status	Action
1	CRM1018	Prashant	North	Super Admin	2018-08-06	LIMS	2018-08-07 10:30 AM	Webinar		 
2	CRM1017	Lalit	North	Super Admin	2018-08-02	PMS	2018-08-02 2:00 PM	Webinar		 
3	CRM1016	Lalit	North	Super Admin	2018-07-31	Spectra	2018-08-01 11:30 AM	Webinar		 
4	CRM1015	Rajiv	North	Sales Mgr6	2018-07-31	LIMS	2018-08-01 10:00 AM	Onsite Webex		 
5	CRM1014	Laxmi	South	Sales Head5	2018-07-30	LIMS	2018-07-30 3:00 PM	Offline Web		 
6	CRM1013	Laxmi	South	Sales Head5	2018-07-28	LIMS	2018-07-28 4:15 PM	Webinar		 
7	CRM1012	Prasad	North	Sales Mgr4	2018-07-27	LIMS	2018-07-28 9:30 AM	Webinar		 
8	CRM1011	Vaishali	North	Super Admin	2018-07-26	LIMS	2018-07-26 6:15 PM	Offline Web		 
9	CRM1010	Vaishali	North	Super Admin	2018-07-26	LIMS	2018-07-27 3:30 PM	Webinar		 
10	CRM1009	Prashant	North	Super Admin	2018-07-25	LIMS	2018-07-25 11:45 AM	Webinar		 

1 2 »

Logout

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- d. Once the demo has been completed Admin, Sales Team, Presales Team cannot edit presales request. User can view presales request by clicking on the View Icon



CRM

Dashboard

Account Management

Target Management

Sales Documents

Presales Requests

Logout

CRM

Presales Requests

Add Presales Request

Presales Requests

Search:

No	PR ID	Account	Territory	Requested By	Request Date	Product	Demo Date and Time	Mode	Status	Action
1	CRM1018	Prashant	North	Super Admin	2018-08-06	LIMS	2018-08-07 10:30 AM	Webinar		
2	CRM1017	Lalit	North	Super Admin	2018-08-02	PMS	2018-08-02 2:00 PM	Webinar		
3	CRM1016	Lalit	North	Super Admin	2018-07-31	Spectra	2018-08-01 11:30 AM	Webinar		
4	CRM1015	Rajiv	North	Sales Mgr6	2018-07-31	LIMS	2018-08-01 10:00 AM	Onsite Webex		
5	CRM1014	Laxmi	South	Sales Head5	2018-07-30	LIMS	2018-07-30 3:00 PM	Offline Web		
6	CRM1013	Laxmi	South	Sales Head5	2018-07-28	LIMS	2018-07-28 4:15 PM	Webinar		
7	CRM1012	Prasad	North	Sales Mgr4	2018-07-27	LIMS	2018-07-28 9:30 AM	Webinar		
8	CRM1011	Vaishali	North	Super Admin	2018-07-26	LIMS	2018-07-26 6:15 PM	Offline Web		
9	CRM1010	Vaishali	North	Super Admin	2018-07-26	LIMS	2018-07-27 3:30 PM	Webinar		
10	CRM1009	Prashant	North	Super Admin	2018-07-25	LIMS	2018-07-25 11:45 AM	Webinar		

1 2 »

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8. Report Management

8.1.Employee Report

- a. To see employee report click on Report Management menu button, it will list Employee Report and Sales Report and click on Employee Report button.

The screenshot displays the CRM Dashboard interface. On the left, a green sidebar contains the navigation menu with the following items: CRM, Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, **Report Management** (highlighted with a red box), Master Management, and Audit Log. The main content area is titled 'Dashboard' and features a calendar for August 2018. The calendar shows dates from 29 to 8, with names like Prashant, Laxmi, Sameer, Rajiv, and Lalit assigned to specific days. To the right of the calendar, there are several KPI cards: 'TOTAL EMPLOYEES' (19), 'TOTAL ACCOUNTS' (21), 'TARGET (QUARTER 2)' (73016), 'FORECAST (QUARTER 2)' (1085325), 'NEW (QUARTER 2)' (24), and 'IN PROGRESS (QUARTER 2)' (2). The bottom of the dashboard shows a 'Logout' button and a copyright notice: 'Copyright ©2018 CRM. All Rights Reserved'.

- b. To get Report,
- A Sales Head has to enter Employee Name and ,
 - if user selects Target Year and Quarter, it will show report for the selected quarter and year
 - or if user selects Year Till Date(YTD) it will show the report till date
 - A Sales Manager gets Employee Name field is disabled. Employee Name field is prefilled with logged in user

The screenshot displays the CRM 'Employee Reports' page. On the left is a green sidebar with navigation links: CRM, Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, Report Management, Master Management, Audit Log, and Logout. The main content area has a header 'Employee Reports' and a 'Search Report' section. This section includes an 'Employee*' dropdown menu, a 'Target' year selector (set to 2018), a 'Select Target For' dropdown, and a 'YTD' checkbox. A green 'Search' button is located below these fields. Underneath the search section are three expandable panels: 'Accounts', 'Tasks', and 'Sales'. Each panel currently shows 'No Record Found'. The footer of the page states 'Copyright ©2018 CRM. All Rights Reserved'.

iii. Sales Team can download Report by clicking on Export button

The screenshot displays the 'Employee Reports' section of a CRM application. The left sidebar contains navigation links: Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, Report Management, Master Management, and Audit Log. The main content area is titled 'Employee Reports' and includes a 'Search Report' section with filters for Employee* (Sales Head), Target (2018), and Quarter 2. A green 'Search' button is present. Below the search section, an 'Export' button is highlighted with a red box. The page contains three data tables:

Accounts Table:

No	Territory	Account Name	Speciality	Number of Beds/Samples Processed	Size	Country	State	City	Software Used	Lead Source
1	North	Prashant	Laboratory	123	Small	India	Jharkhand	Jamshedpur	Attune	Self
2	North	Karthik	Hospital	456	Medium	India	West Bengal	Kolkata	Jira	Social Media
3	North	Account	Laboratory	11	Small	Afghanistan	Badakhshan	Afg	Attune	Conference

Tasks Table:

No	Account Name	Product	Task Date	Follow Up Date	Follow Up Task	Follow Up Task Status	Remarks
1	Prashant	LIMS	31-07-2018	31-07-2018	Phone Call	New	testby agri
2	Prashant	Spectra	31-07-2018	01-08-2018	Negotiations	In Progress	remark
3	Prashant	LIMS	30-07-2018	30-07-2018	Phone Call	New	test
4	Prashant	HIS	30-07-2018	31-07-2018	Phone Call	New	remarks
5	Prashant	HIS	30-07-2018	30-07-2018	Phone Call	New	reмар
6	Prashant	ClaimBook	29-07-2018	30-07-2018	Proposal	Closed	remmarks
7	Prashant	ClaimBook	28-07-2018	29-07-2018	Proposal	Closed	remarks

Sales Table:

No	Account	Product	Stage	Date	Amount
1	Prashant	LIMS	Cold	31-07-2018	100.00
2	Prashant	Spectra	Cold	31-07-2018	152.00
3	Prashant	HIS	Cold	30-07-2018	101.00
4	Prashant	ClaimBook	Close Won	29-07-2018	200.00
					553.00

At the bottom of the page, there is a 'Logout' button and a copyright notice: 'Copyright ©2018 CRM. All Rights Reserved'.

8.2.Sales Report

- To see sales report click on Report Management menu button, it will list Employee Report and Sales Report and Click on Sales Report button.
- Only Sales Head can see Sales Report.

The screenshot shows the CRM interface with a green sidebar menu. The 'Report Management' menu is expanded, showing 'Sales Reports' as the selected option. The main content area is titled 'Sales Reports' and contains a 'Search Report' section with the following fields:

- Stage*: Select Stage (dropdown menu)
- Date*: 03-08-2018 (input field) and To Date (input field)
- Product: Select Product (dropdown menu)
- Search (button)

Below the search form is an 'Accounts' section with a table that displays 'No Record Found'.

- Sales Head wants to select stage, date and product (can select multiple products also).

The screenshot shows the CRM interface with the same green sidebar menu. The 'Report Management' menu is expanded, showing 'Sales Reports' as the selected option. The main content area is titled 'Sales Reports' and contains a 'Search Report' section with the following fields:

- Stage*: Cold (dropdown menu)
- Date*: 01-07-2018 (input field) and 31-08-2018 (input field)
- Product: ClaimBook, Spectra (checkboxes)
- Search (button)

Below the search form is a summary table with the following data:

Metric	Value
MRR (INR)	202.00
MRR (USD)	2.94
License (INR)	152.00
License (USD)	2.21

Below the summary table is an 'Accounts' section with a table that displays the following data:

No	Country	Region	Account Name	Product	Model	MRR (INR)	MRR (USD)	License (INR)	License (USD)	Stage	Follow Up Task Status	Comments
1	India	South	Sameer	Spectra	Rental	102.00	1.48	0.00	0.00	Cold	New	remh
2	India	North	Prashant	Spectra	License	0.00	0.00	152.00	2.21	Cold	In Progress	remark
3	India	South	Laxmi	Spectra	Rental	100.00	1.45	0.00	0.00	Cold	Closed	gngngfn
						202.00	2.93	152.00	2.21			

9. Master Management

Master Fields are Territory, Designation, Product, Mode of Demo, Specialty, Lead Source and Account Status.

- Click on Master Management in menu to list all the above fields. Click on individual fields to Add, Edit, View, Delete and Enable/Disable.

The screenshot displays the CRM application interface. On the left, a green sidebar contains the 'CRM' menu with options: Dashboard, Employee Management, Account Management, Target Management, Sales Documents, Presales Requests, Report Management, and Master Management (highlighted with a red box). Below these are sub-menus for Territory, Designation, Product, Mode of Demo, Specialty, Lead Source, and Account Status, followed by Audit Log and Help. The main content area is titled 'Dashboard' and includes a 'Sales Calendar' for August 2018, a 'Presales Calendar' for August 2018, and several KPI cards. The KPI cards show: 7 Total Employees, 4 Total Accounts, 60200000 Target (Quarter 2), 70000 Forecast (Quarter 2), 3 New (Quarter 2), and 1 In Progress (Quarter 2). The footer indicates 'Copyright ©2018 CRM. All Rights Reserved'.

CRM

Home

Dashboard

Sales Calendar

August 2018

SUN	MON	TUE	WED	THU	FRI	SAT
29	30	31	1	2	3	4
5	6	7	8 Jehangir Hospital	9	10 Lilavati Hospital	11
12	13	14	15 Jehangir Hospital Lokmanya Hospitals	16	17	18
19	20	21	22 Lilavati Hospital	23	24	25
26 PRS Hospital	27	28	29	30	31	1
2	3	4	5	6	7	8 Rajagiri Hospital

Presales Calendar

August 2018

SUN	MON	TUE	WED	THU	FRI	SAT
29	30	31	1	2	3	4
5	6	7	8	9	10 Demo Completed	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

7
TOTAL EMPLOYEES

4
TOTAL ACCOUNTS

60200000
TARGET
(QUARTER 2)

70000
FORECAST
(QUARTER 2)

3
NEW
(QUARTER 2)

1
IN PROGRESS
(QUARTER 2)

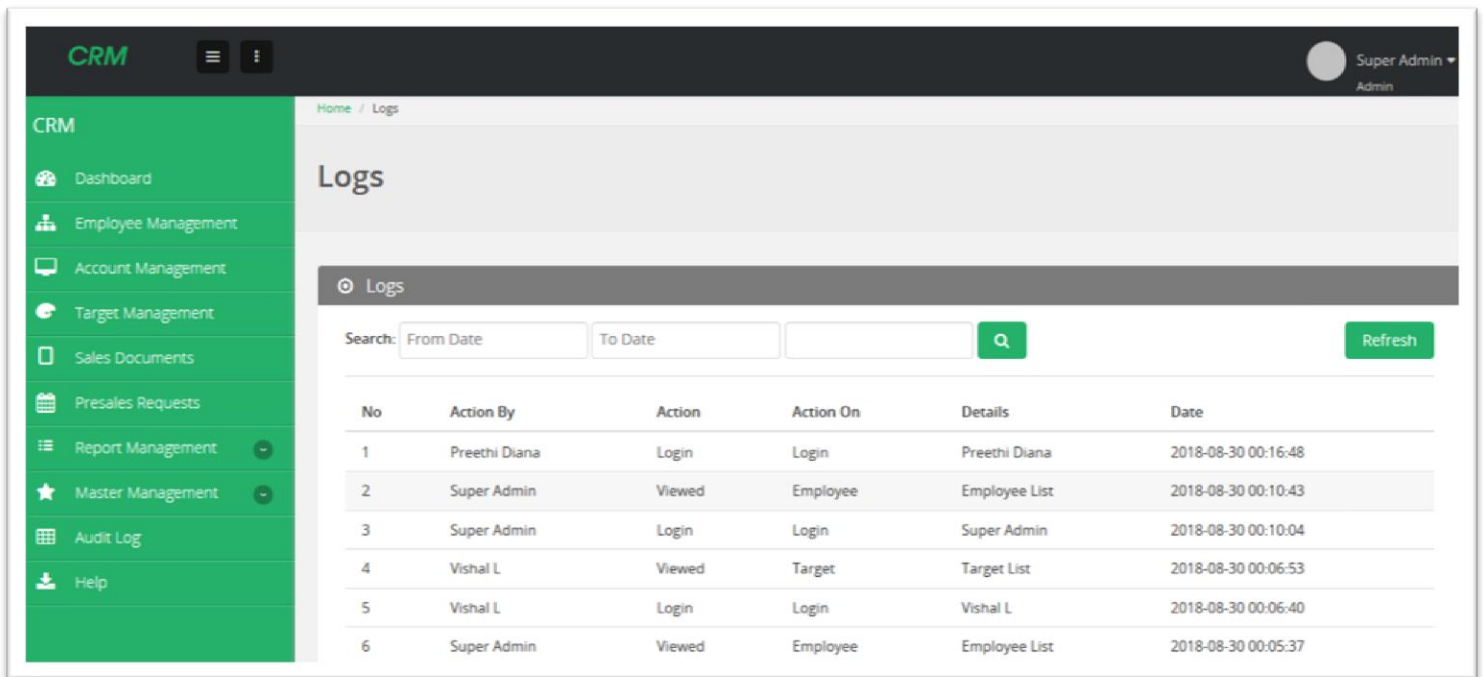
Logout

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- b. Only Admin and Sales Head can Add, Edit, View, Delete and Enable/Disable all the master fields.
- To add click on Add button located on right corner of the master fields page (Territory, Designation, Product, Mode of Demo, Specialty, Lead Source and Account Status).
 - To edit master fields (Territory, Designation, Product, Mode of Demo, Specialty, Lead Source and Account Status) click on Edit Icon 
 - To view master fields (Territory, Designation, Product, Mode of Demo, Specialty, Lead Source and Account Status) click on View Icon 
 - To delete master fields (Territory, Designation, Product, Mode of Demo, Specialty, Lead Source and Account Status) click on Delete Icon 
 - To enable/disable master fields (Territory, Designation, Product, Mode of Demo, Specialty, Lead Source and Account Status) click on Enable/Disable Icon 

10. Audit Log

Only Admin and Sales Head can view the Audit Log.



The screenshot shows the CRM interface with the 'Audit Log' section active. The left sidebar lists various CRM modules, and the main content area displays a table of system logs. The table has the following data:

No	Action By	Action	Action On	Details	Date
1	Preethi Diana	Login	Login	Preethi Diana	2018-08-30 00:16:48
2	Super Admin	Viewed	Employee	Employee List	2018-08-30 00:10:43
3	Super Admin	Login	Login	Super Admin	2018-08-30 00:10:04
4	Vishal L	Viewed	Target	Target List	2018-08-30 00:06:53
5	Vishal L	Login	Login	Vishal L	2018-08-30 00:06:40
6	Super Admin	Viewed	Employee	Employee List	2018-08-30 00:05:37