
CRM – User Guide (Presales)

Contents

- 1. Overview..... 3
- 2. Dashboard..... 3
 - 2.1. Calendar..... 3
- 3. Account Management 4
- 4. Target Management 5
- 5. Sales Documents..... 6
 - 5.1. Create Folder 6
 - 5.2. Upload Document..... 6
- 6. Presales Requests 7
 - 6.1. Add Presales Requests..... 7
 - 6.2. Assign Presales Demo SPOC 8
 - 6.3. Edit Presales Request 8
 - 6.4. Demo Completed..... 9

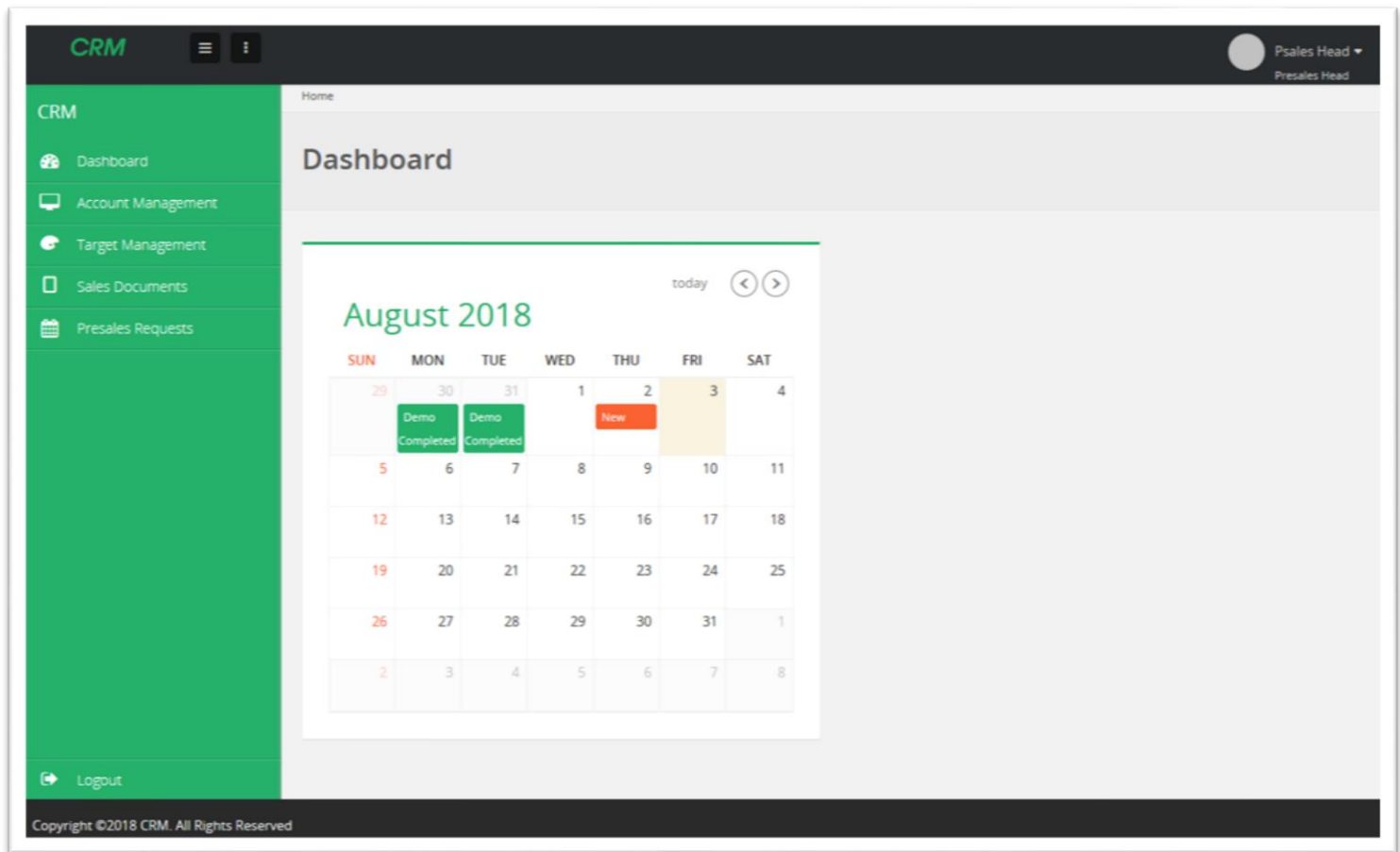
1. Overview

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

2. Dashboard

2.1. Calendar

- i. A Presales Head can see all the presales requests in the calendar
- ii. A Presales SPOC can only see their requests in the calendar if he/she assigned as presales SPOC



3. Account Management

Presales Team can only view all the accounts, products and tasks.

The screenshot displays the CRM interface for Account Management. The left sidebar contains navigation links: Dashboard, Account Management, Target Management, Sales Documents, and Presales Requests. The main content area is titled 'Accounts' and features a search bar, a refresh button, and a table of account data.

No	Created On	Account	Employee	Product	Task	Status
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 »

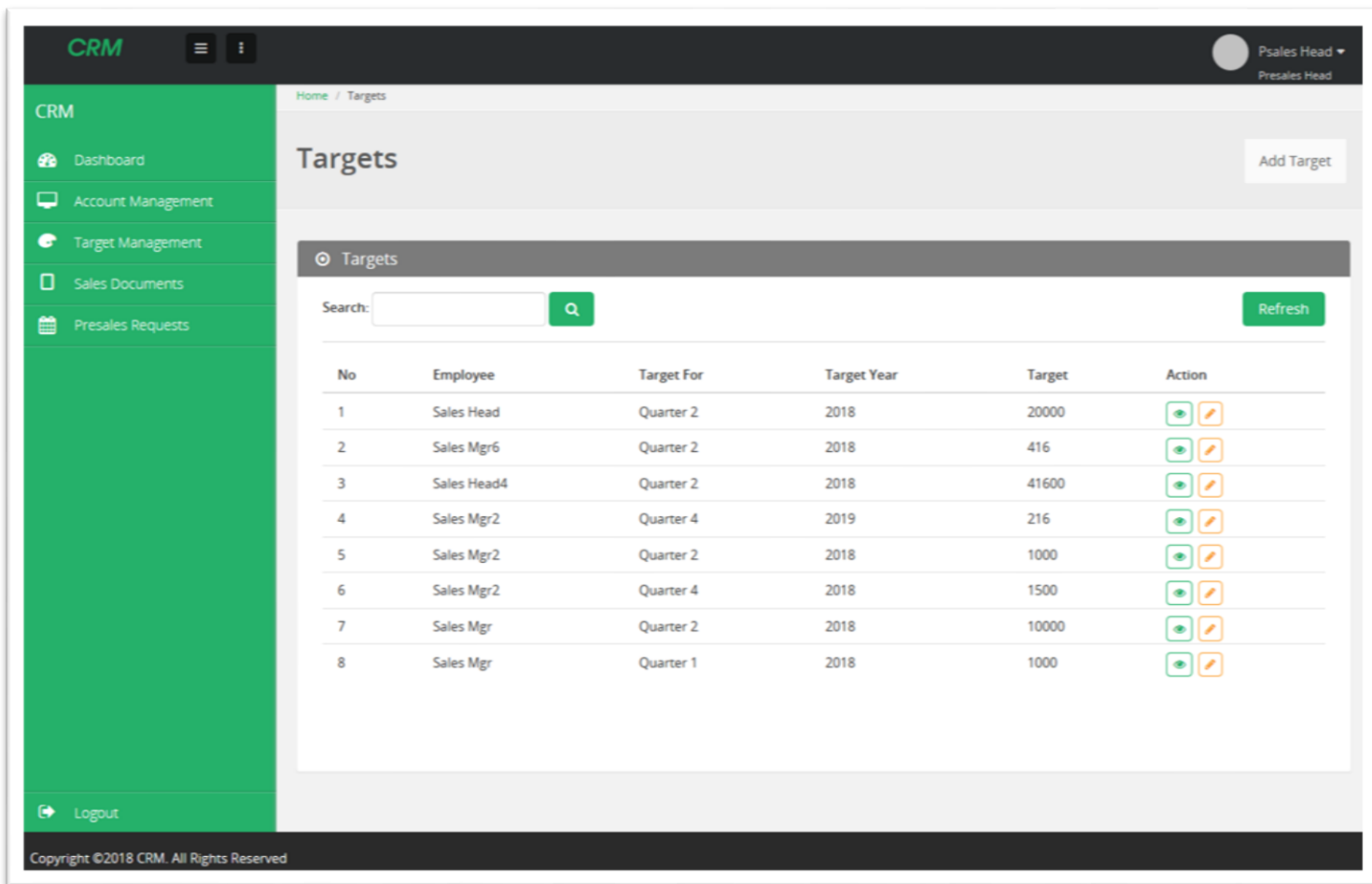
Logout

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4. Target Management

Presales Team can

- Add target by clicking on Add Target button on the right corner
- Edit target by clicking on the Edit Icon 
- View the Targets by click on the View Icon 



The screenshot displays the CRM interface for Target Management. The left sidebar contains navigation links: Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, and Logout. The main content area is titled 'Targets' and includes an 'Add Target' button. Below the title is a search bar with a magnifying glass icon and a 'Refresh' button. A table lists the targets with columns: No, Employee, Target For, Target Year, Target, and Action. The table contains 8 rows of data. The footer shows the copyright notice: 'Copyright ©2018 CRM. All Rights Reserved'.

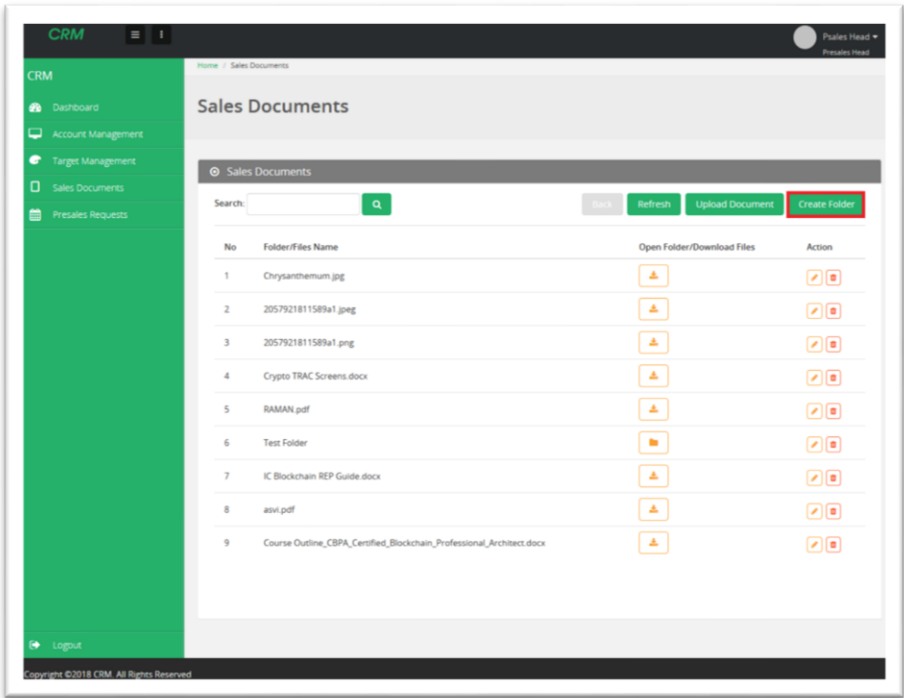
No	Employee	Target For	Target Year	Target	Action
1	Sales Head	Quarter 2	2018	20000	 
2	Sales Mgr6	Quarter 2	2018	416	 
3	Sales Head4	Quarter 2	2018	41600	 
4	Sales Mgr2	Quarter 4	2019	216	 
5	Sales Mgr2	Quarter 2	2018	1000	 
6	Sales Mgr2	Quarter 4	2018	1500	 
7	Sales Mgr	Quarter 2	2018	10000	 
8	Sales Mgr	Quarter 1	2018	1000	 

5. Sales Documents

5.1. Create Folder

Presales Team can create folder for Sales Documents.

- a. To create folder click on Create Folder button.

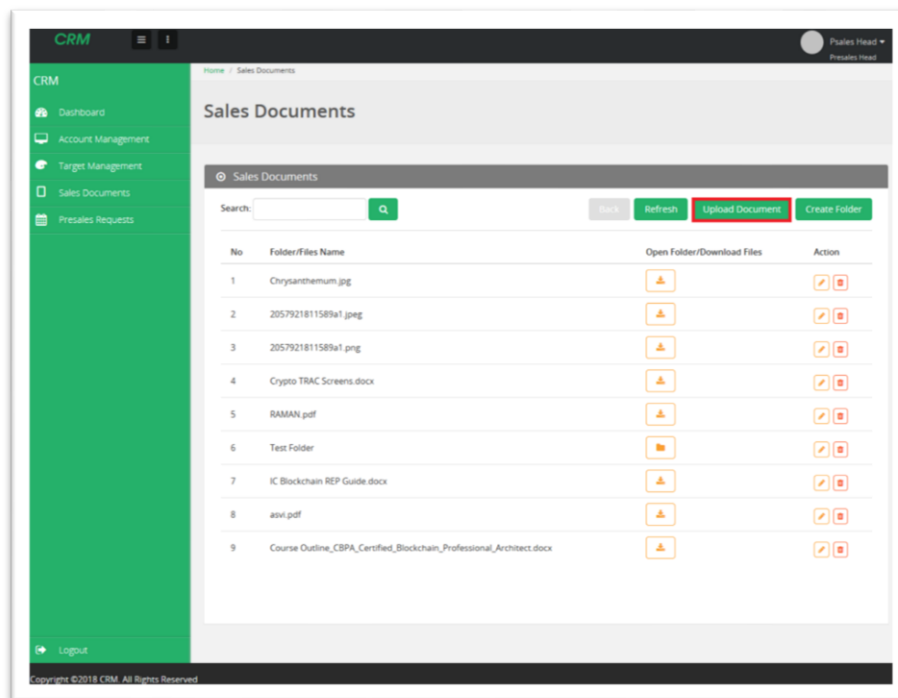


- b. To edit folder click on the Edit Icon 
- c. To delete folder click on the Delete Icon 

5.2. Upload Document

Presales Team can Upload Documents.

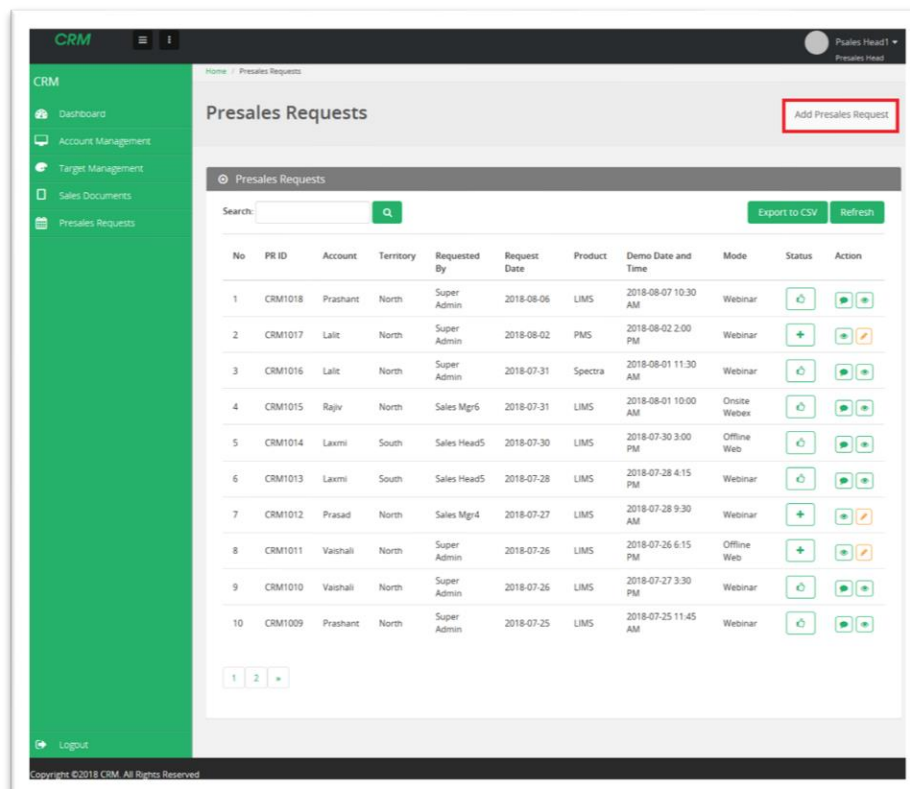
- a. To upload document click on Upload Document button.
- b. To delete the uploaded document click on the Delete Icon 



6. Presales Requests

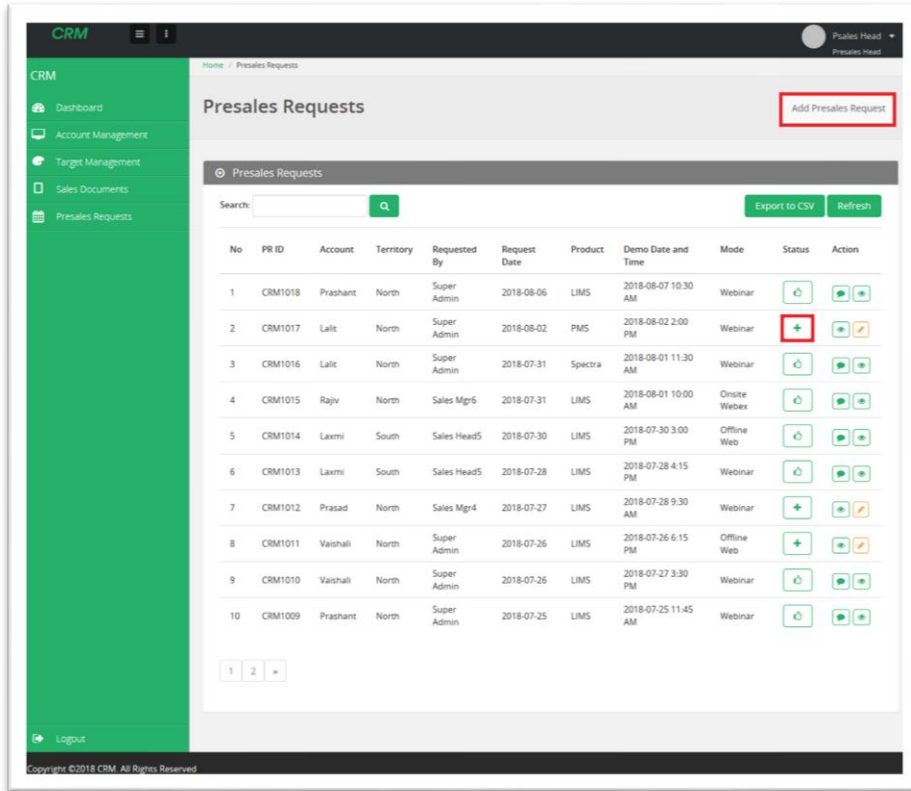
6.1. Add Presales Requests

- To add presales requests click on Add Presales Request button.
- Presales Team can add presales request.



6.2. Assign Presales Demo SPOC

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

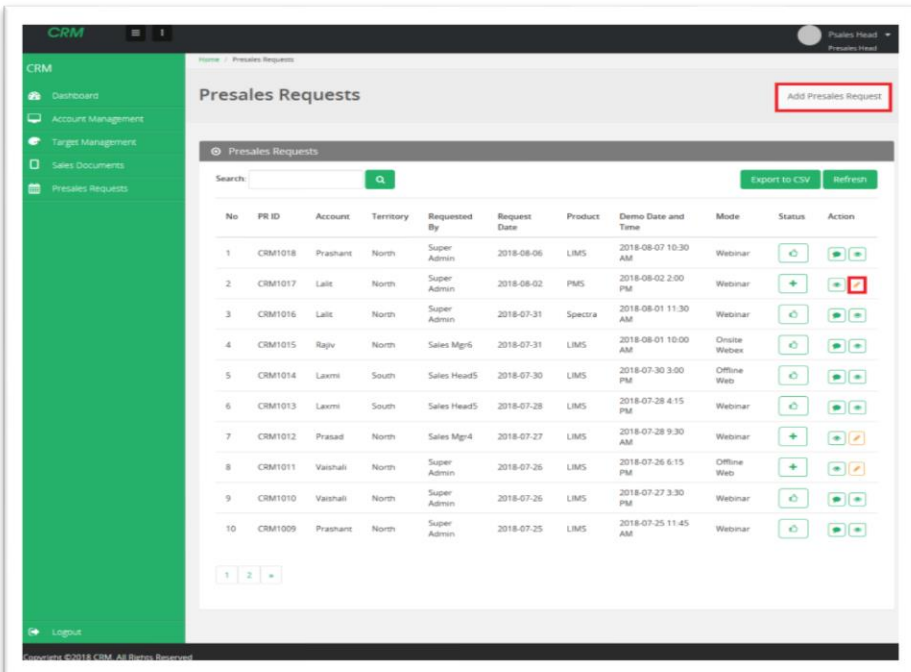


The screenshot shows the CRM interface with a sidebar on the left containing links to Dashboard, Account Management, Target Management, Sales Documents, and Presales Requests. The main area is titled 'Presales Requests' and includes a search bar, 'Export to CSV', and 'Refresh' buttons. A table lists 10 requests with columns: No, PR ID, Account, Territory, Requested By, Request Date, Product, Demo Date and Time, Mode, Status, and Action. The 'Action' column for request 2 (CRM1017) shows a green square with a white plus sign, which is highlighted with a red box. Other icons in the 'Action' column include a green circle with a checkmark and a green circle with a plus sign.

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	2018-07-25	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		

6.3. Edit Presales Request

- A Presales Head can edit presales request by clicking on the Edit Icon 



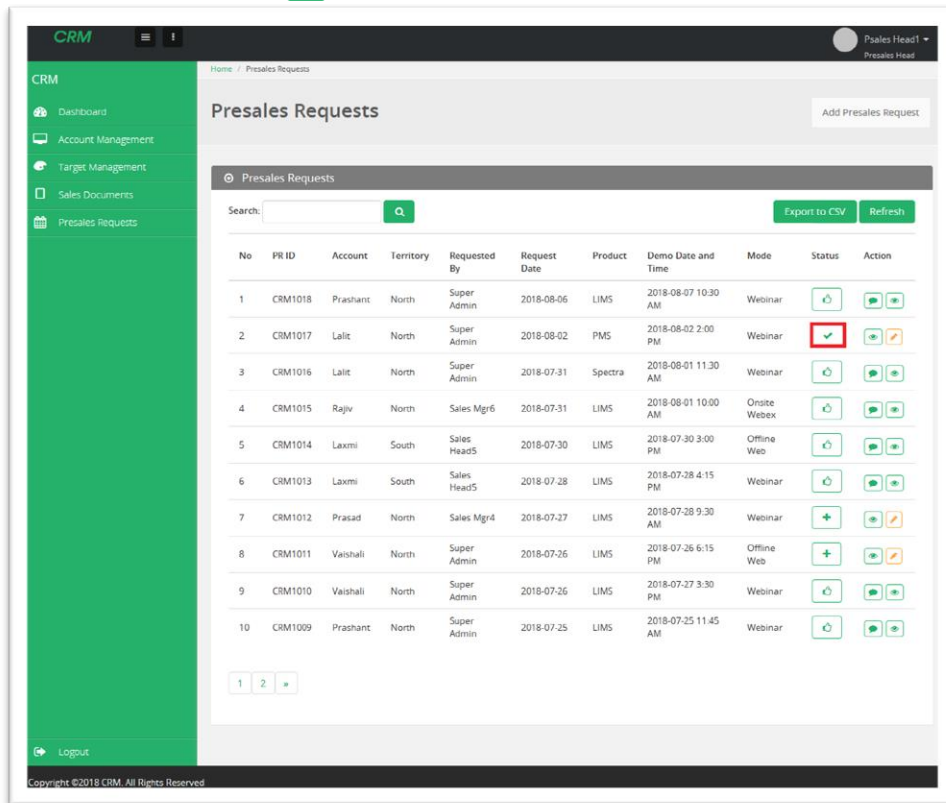
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- b. A Presales SPOC, can edit presales request only when they assigned as Presales Demo SPOC by Presales Head.

6.4. Demo Completed

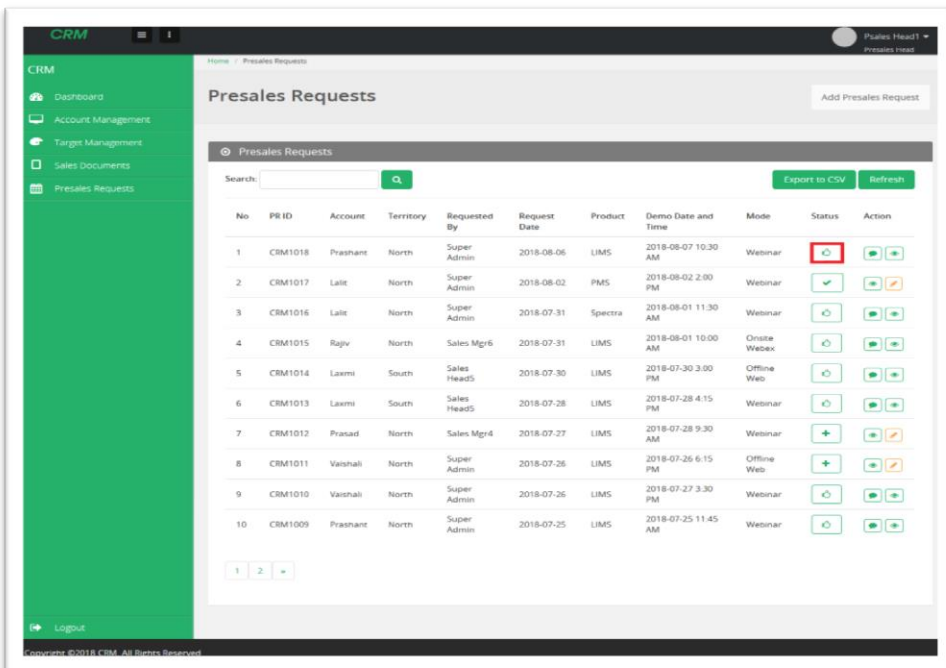
- a. Admin, Presales Head and assigned Presales SPOC can change status as Demo Completed by clicking on the Demo Completed Icon 



The screenshot shows the CRM interface with a sidebar menu on the left containing: Dashboard, Account Management, Target Management, Sales Documents, and Presales Requests. The main header shows 'CRM' and 'Presales Head1' with a dropdown arrow. The page title is 'Presales Requests' with an 'Add Presales Request' button. Below the title is a search bar and buttons for 'Export to CSV' and 'Refresh'. The table lists 10 presales requests with columns: No, PR ID, Account, Territory, Requested By, Request Date, Product, Demo Date and Time, Mode, Status, and Action. Request 2 (CRM1017) has a status of 'Demo Completed' (green checkmark icon). Request 1 (CRM1018) has a status of 'In Progress' (green circle with a plus icon). Request 3 (CRM1016) has a status of 'In Progress' (green circle with a plus icon). Request 4 (CRM1015) has a status of 'In Progress' (green circle with a plus icon). Request 5 (CRM1014) has a status of 'In Progress' (green circle with a plus icon). Request 6 (CRM1013) has a status of 'In Progress' (green circle with a plus icon). Request 7 (CRM1012) has a status of 'In Progress' (green circle with a plus icon). Request 8 (CRM1011) has a status of 'In Progress' (green circle with a plus icon). Request 9 (CRM1010) has a status of 'In Progress' (green circle with a plus icon). Request 10 (CRM1009) has a status of 'In Progress' (green circle with a plus icon). The footer shows 'Logout' and 'Copyright ©2018 CRM. All Rights Reserved'.

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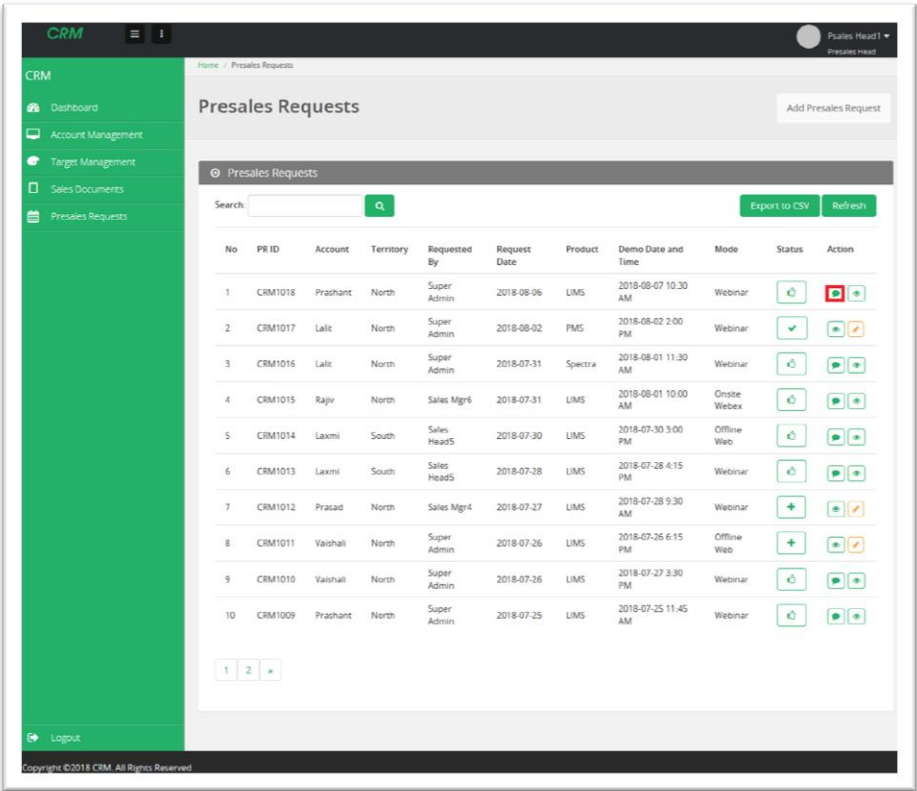
- b. After demo completion icon will change as 



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



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

