
CRM – User Guide (Sales)

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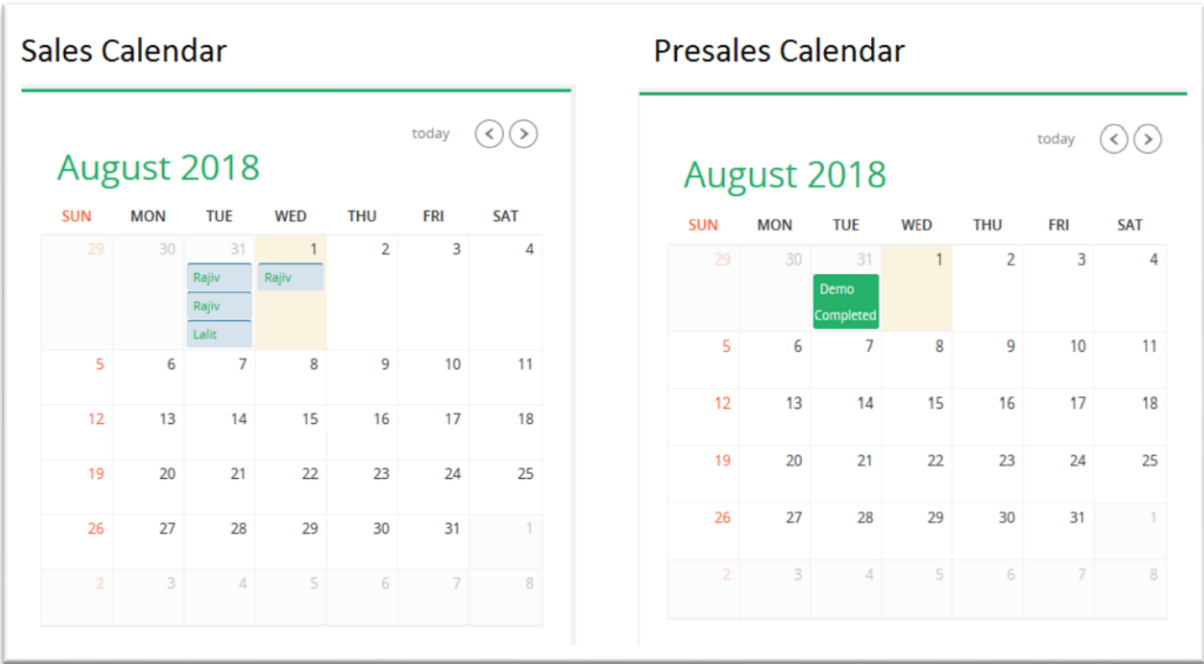
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1. Overview

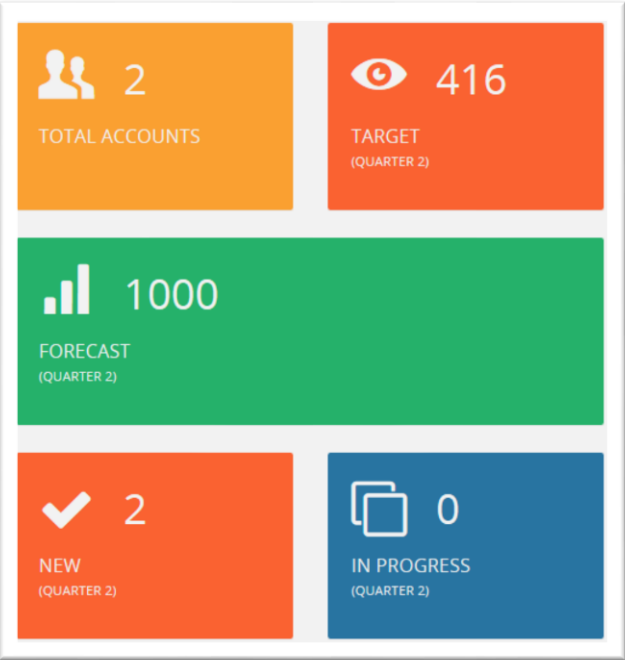
CRM is the developed for managing the Customers, their Products and the related Sales & Presales Tasks.

2. Dashboard

2.1.Calendar



2.2.Total Counts



3. Account Management

3.1.Add Account

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

The screenshot displays the CRM Accounts Management interface. 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 is titled 'Accounts' and includes a search bar and a 'Refresh' button. The table below lists 10 accounts, with the 5th account (Sonali) marked as disabled in red. An 'Add Account' button is highlighted in the top right corner.

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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- c. Fill the details in the Add Account page and click on Submit button.
 - i. A Sales Head can select any Employee with the selected Territory
 - ii. 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

No Contact Found

Additional Remarks

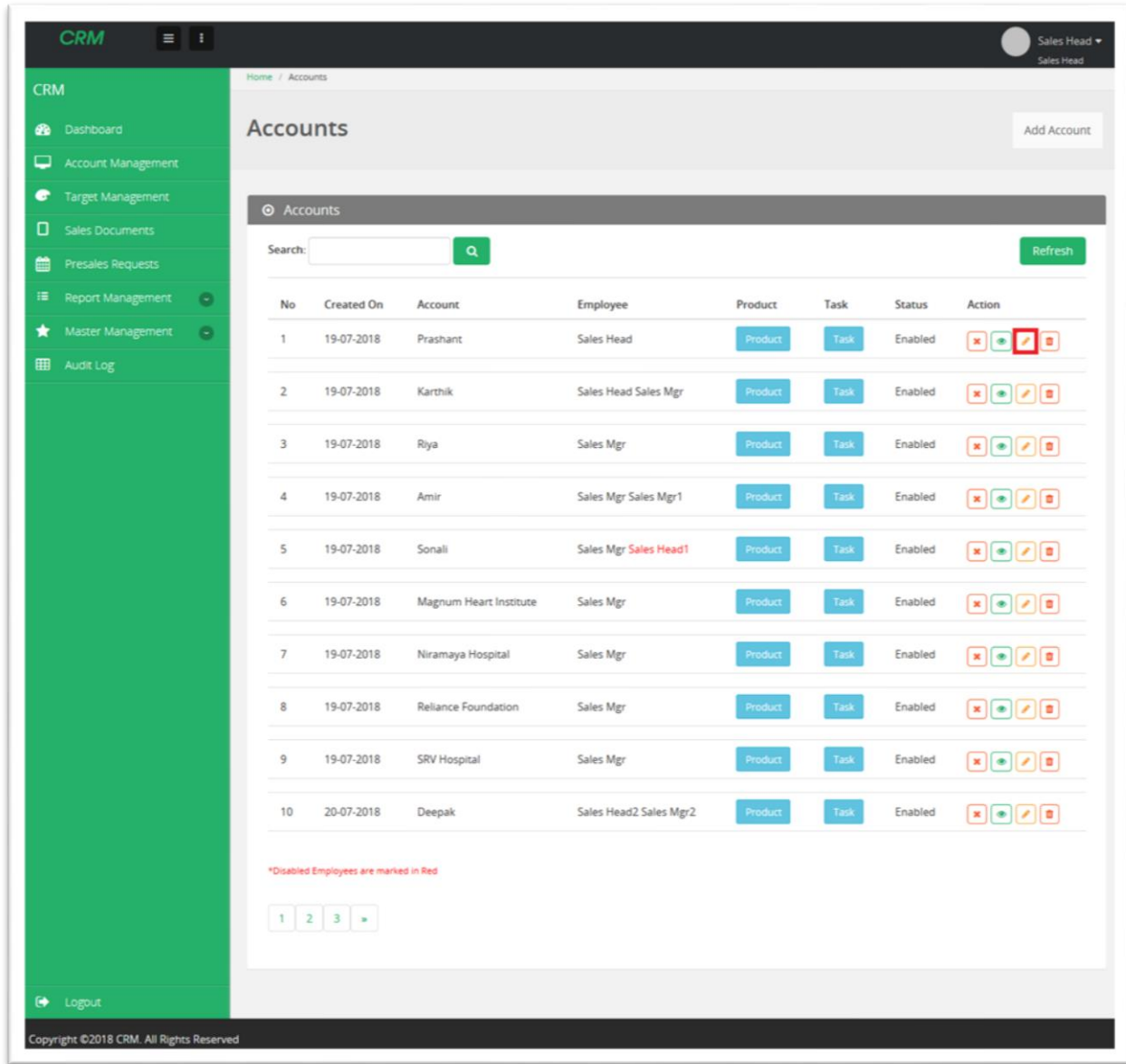
Status*

Logout

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3.2.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 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 first account, Prashant, is highlighted with a red box around the edit icon in the Action column. The second account, Karthik, is also highlighted with a red box around the edit icon. The third account, Riya, is highlighted with a red box around the edit icon. The fourth account, Amir, is highlighted with a red box around the edit icon. The fifth account, Sonali, is highlighted with a red box around the edit icon. The sixth account, Magnum Heart Institute, is highlighted with a red box around the edit icon. The seventh account, Niramaya Hospital, is highlighted with a red box around the edit icon. The eighth account, Reliance Foundation, is highlighted with a red box around the edit icon. The ninth account, SRV Hospital, is highlighted with a red box around the edit icon. The tenth account, Deepak, is highlighted with a red box around the edit icon. The footer of the page contains the text: Copyright ©2018 CRM. All Rights Reserved.

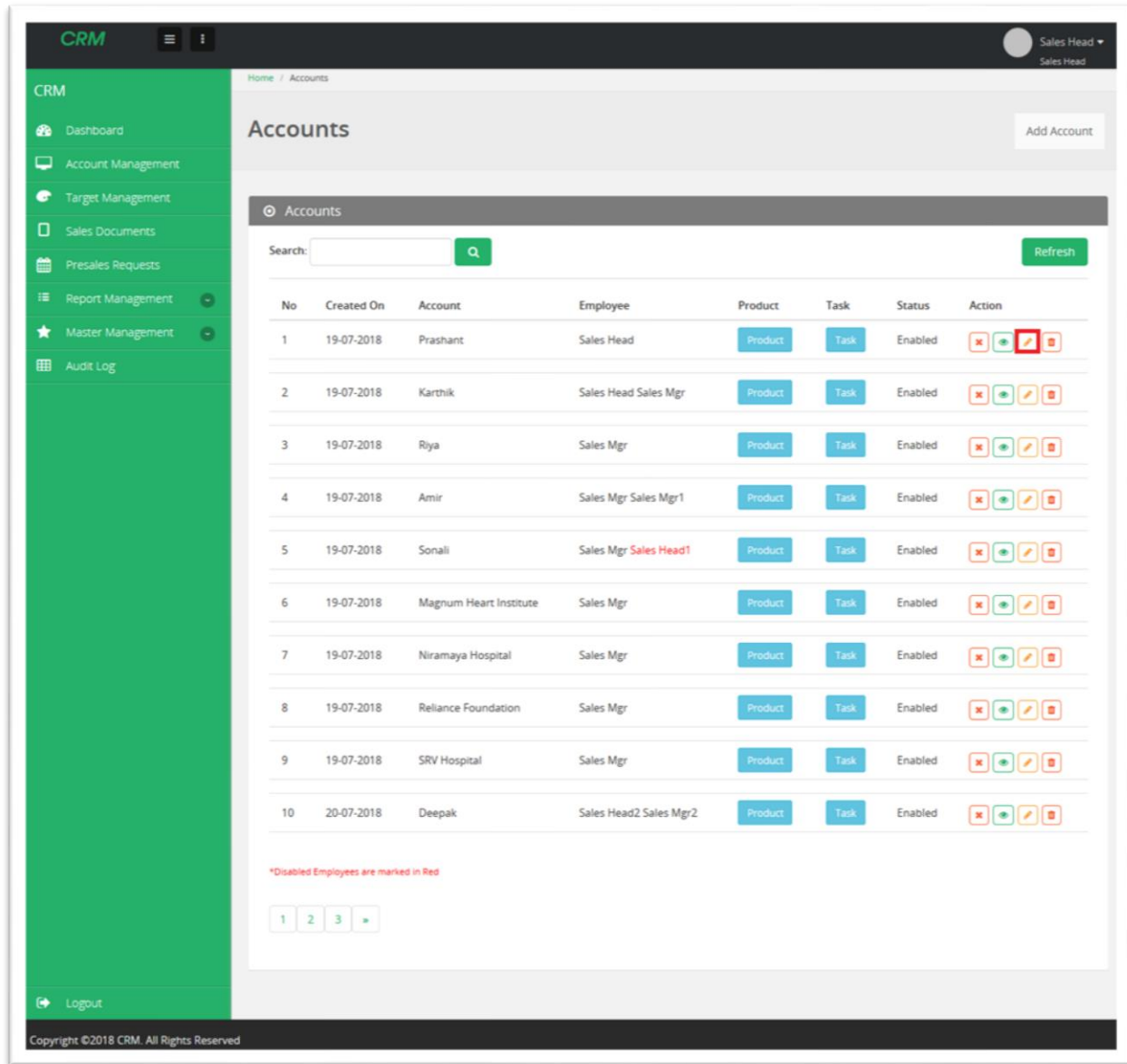
No	Created On	Account	Employee	Product	Task	Status	Action
1	19-07-2018	Prashant	Sales Head	Product	Task	Enabled	   
2	19-07-2018	Karthik	Sales Head Sales Mgr	Product	Task	Enabled	   
3	19-07-2018	Riya	Sales Mgr	Product	Task	Enabled	   
4	19-07-2018	Amir	Sales Mgr Sales Mgr1	Product	Task	Enabled	   
5	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 »

3.3.View Account

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



CRM

Home / Accounts

Accounts

Add Account

Accounts

Search:  

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 »

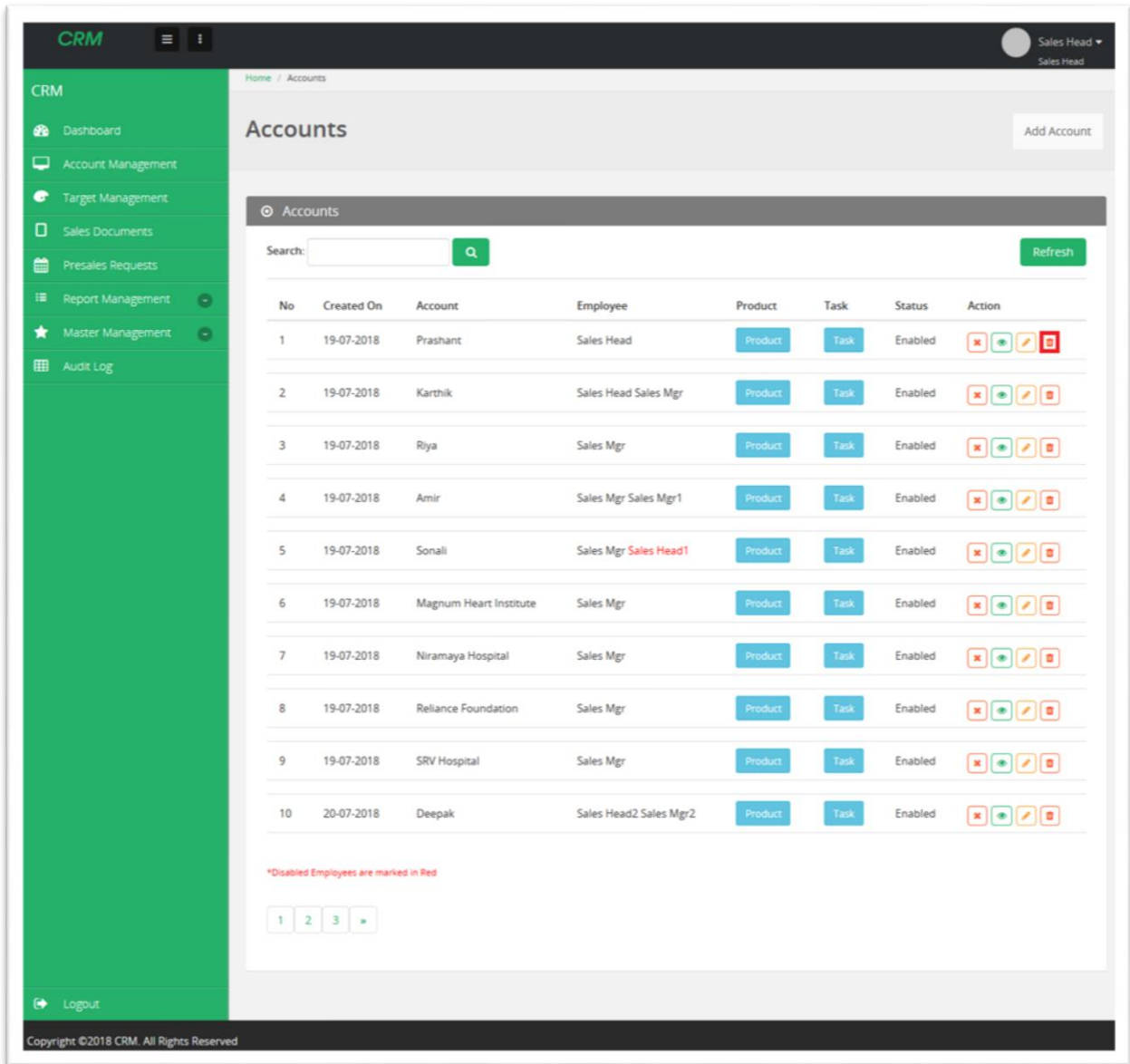
Logout

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3.4. Delete Account

Only Admin and Sales Head can delete accounts.

- a. To delete account click on Delete Icon 



The screenshot shows the CRM Accounts 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 displays 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. A red box highlights the delete icon in the first row.

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	   

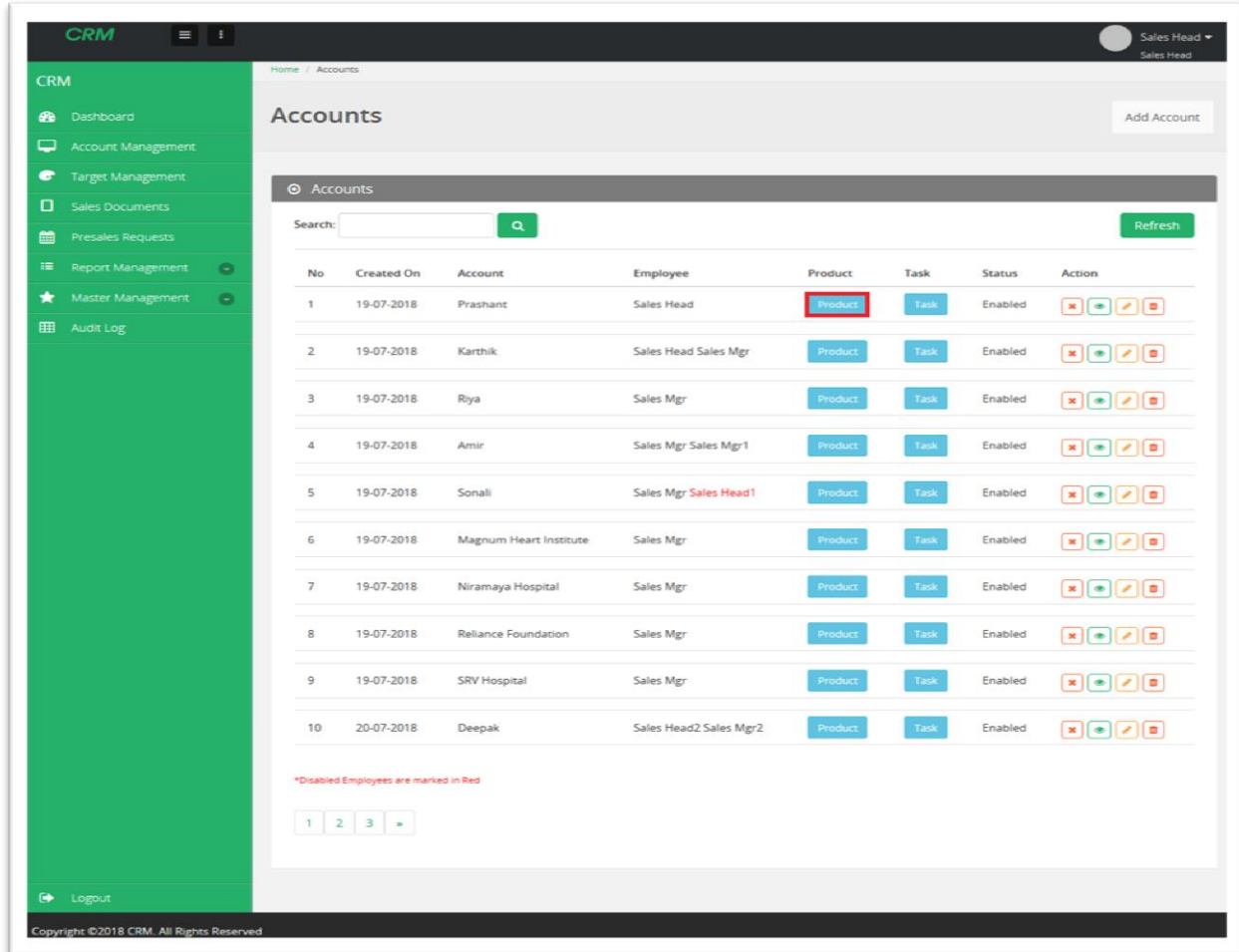
*Disabled Employees are marked in Red

1 2 3 »

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

3.5.Add Product

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

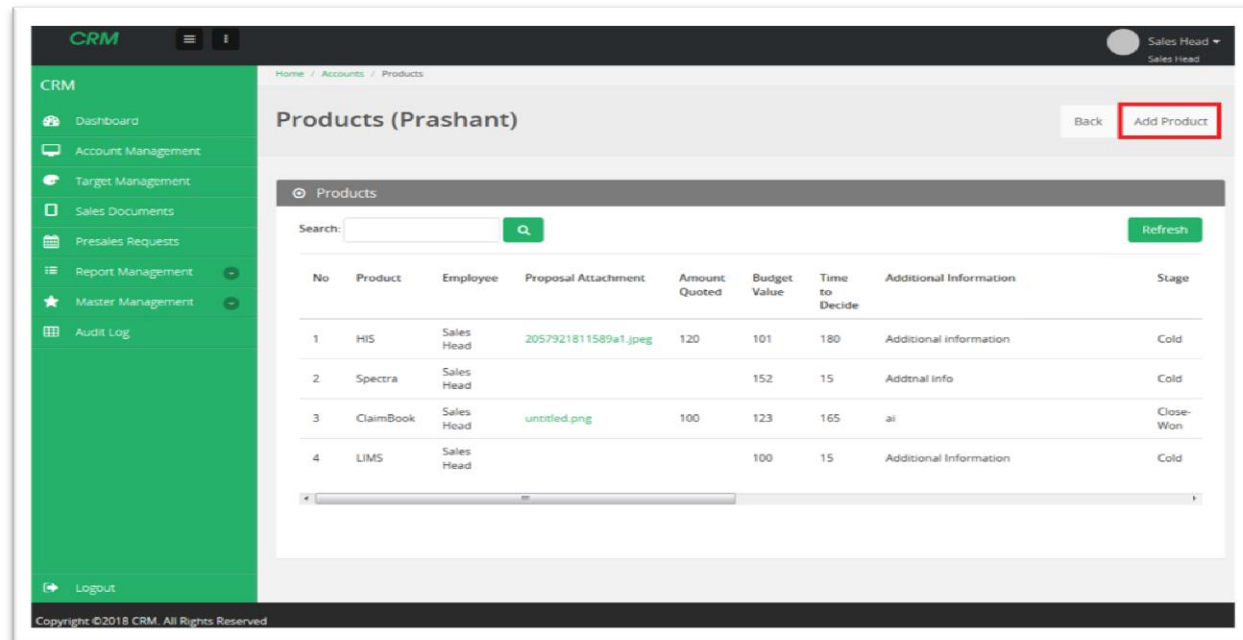


The screenshot shows the CRM interface with the 'Accounts' page. The left sidebar contains the CRM menu. The main content area displays a table of accounts. The 'Product' column for the first entry is highlighted with a red box.

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.

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. 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 has a header 'Add Product (Prashant)' with a 'Back' button. Below the header is a section titled 'Add Product' containing the following fields:

- 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 are 'Submit' and 'Back' buttons. The footer shows 'Copyright ©2018 CRM. All Rights Reserved'.

3.6.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

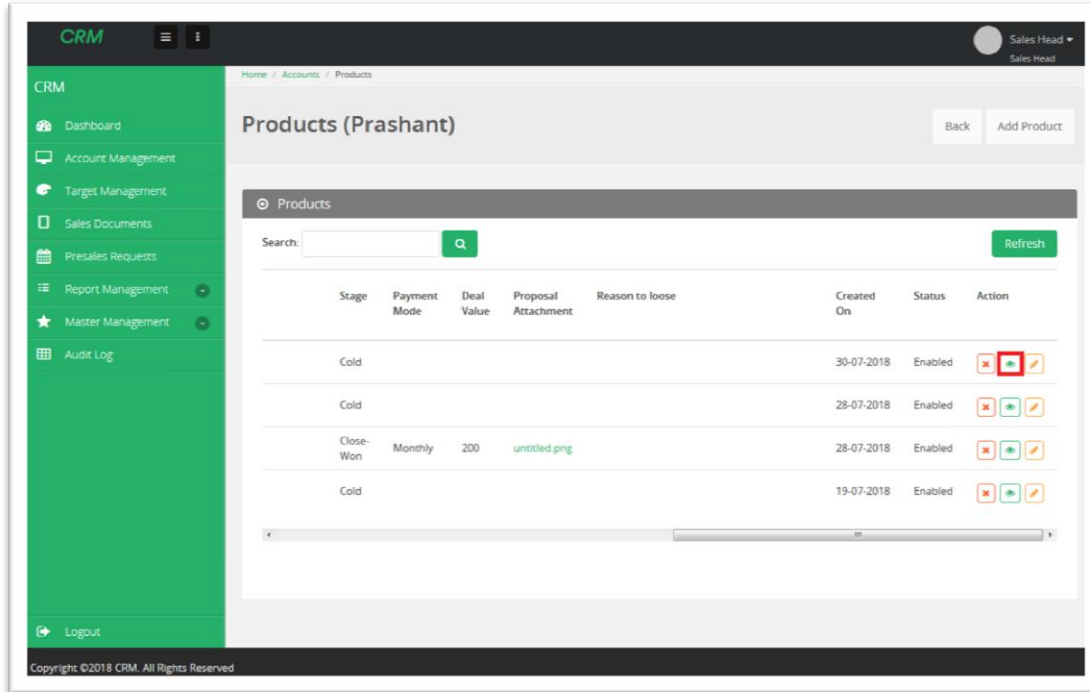
The screenshot shows the 'Products (Prashant)' table. The left sidebar is the same as in the previous screenshot. The main content area has a header 'Products (Prashant)' with 'Back' and 'Add Product' buttons. Below the header is a section titled 'Products' with a search bar and a 'Refresh' button. The table below lists products:

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 footer shows 'Copyright ©2018 CRM. All Rights Reserved'.

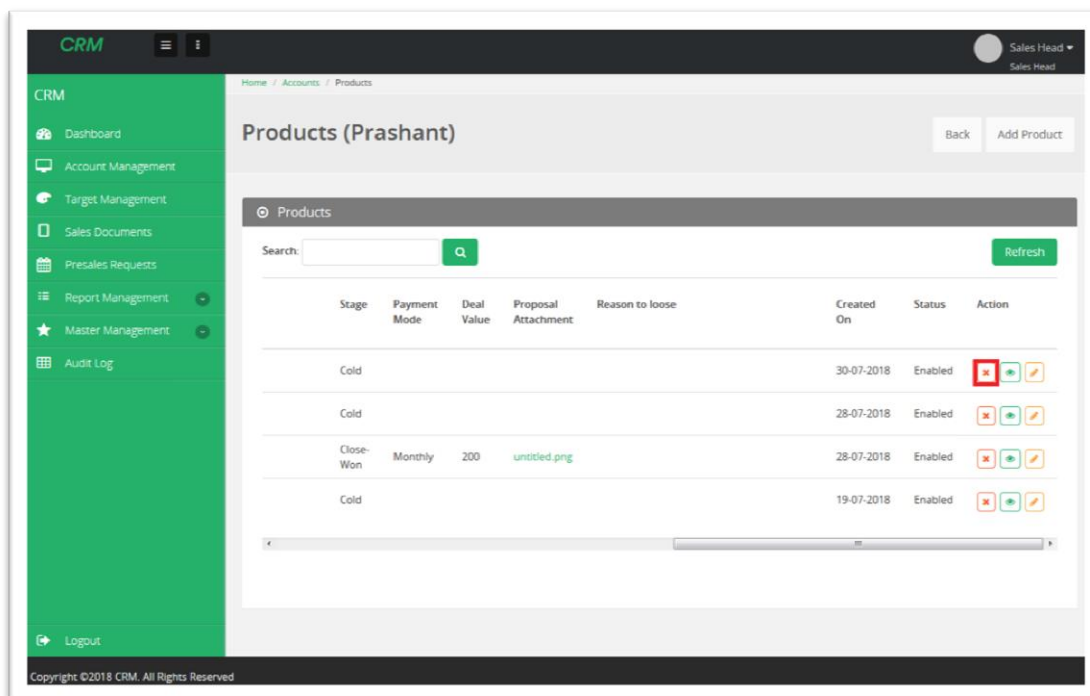
3.7.View Product

- a. To view product click on the View Icon 



3.8.Enable/Disable Product

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



3.9.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

The screenshot shows the 'Accounts' page in the CRM. A table lists 10 accounts. The 'Task' column contains buttons labeled 'Product' and 'Task'. The 'Task' button for the first account (Prashant) is highlighted with a red box. The 'Status' column shows 'Enabled' for all accounts. The 'Action' column contains icons for edit, delete, and other actions.

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

The screenshot shows the 'Tasks (Prashant)' page in the CRM. A table lists 9 tasks. The 'Add Task' button is highlighted with a red box. The 'Status' column shows various task statuses like 'New', 'In Progress', 'Closed', etc. The 'Follow Up Task' column shows the next task to be performed.

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

CRM

Home / Accounts / Tasks / Add Task

Add Task (Rajiv)

Back

Add Task

Employee* Sales Mgr6

Product* Select Product

Task Date* 01-08-2018

Follow Up Date* 01-08-2018

Follow Up Task* Select Follow Up Task

Follow Up Task Status* New

Stage* Select Stage

Remarks*

Submit Back

Logout

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3.10. Edit Task

- a. To edit task click on the Edit Icon

CRM

Home / Accounts / Tasks

Tasks (Rajiv)

Back Add Task

Tasks

Search

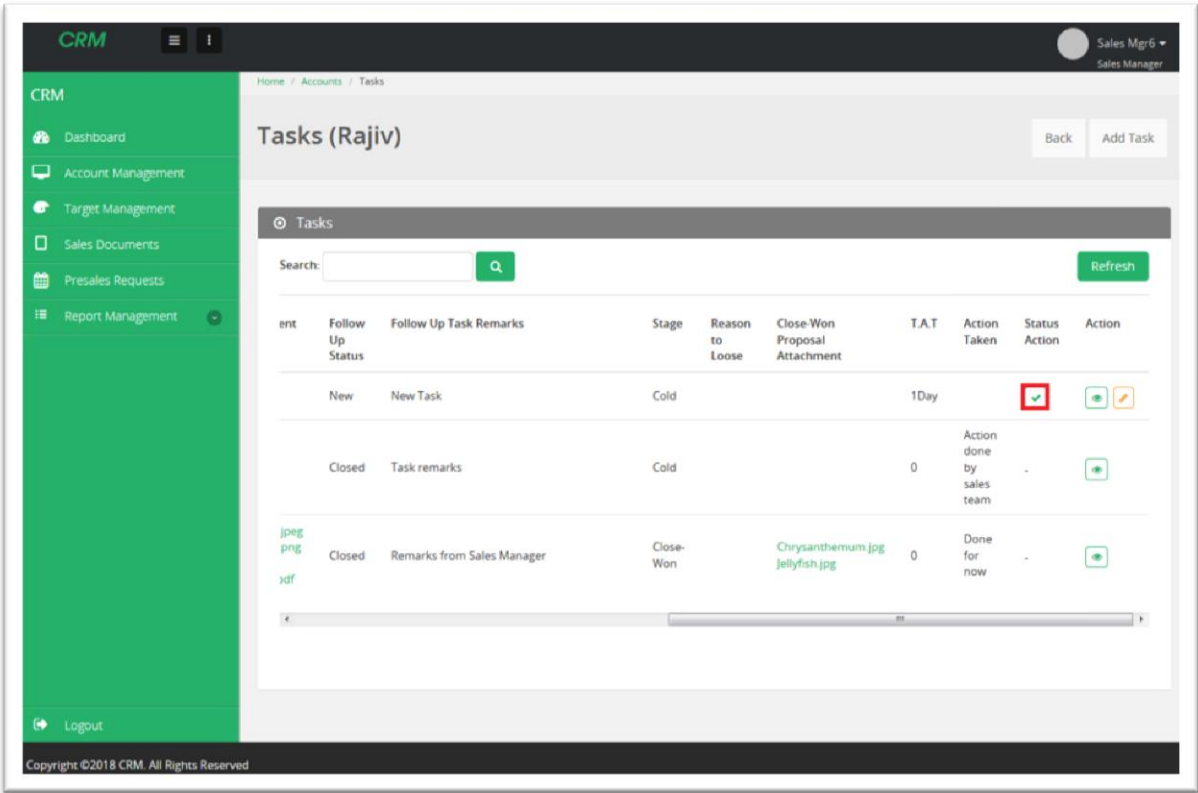
Refresh

Task	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		

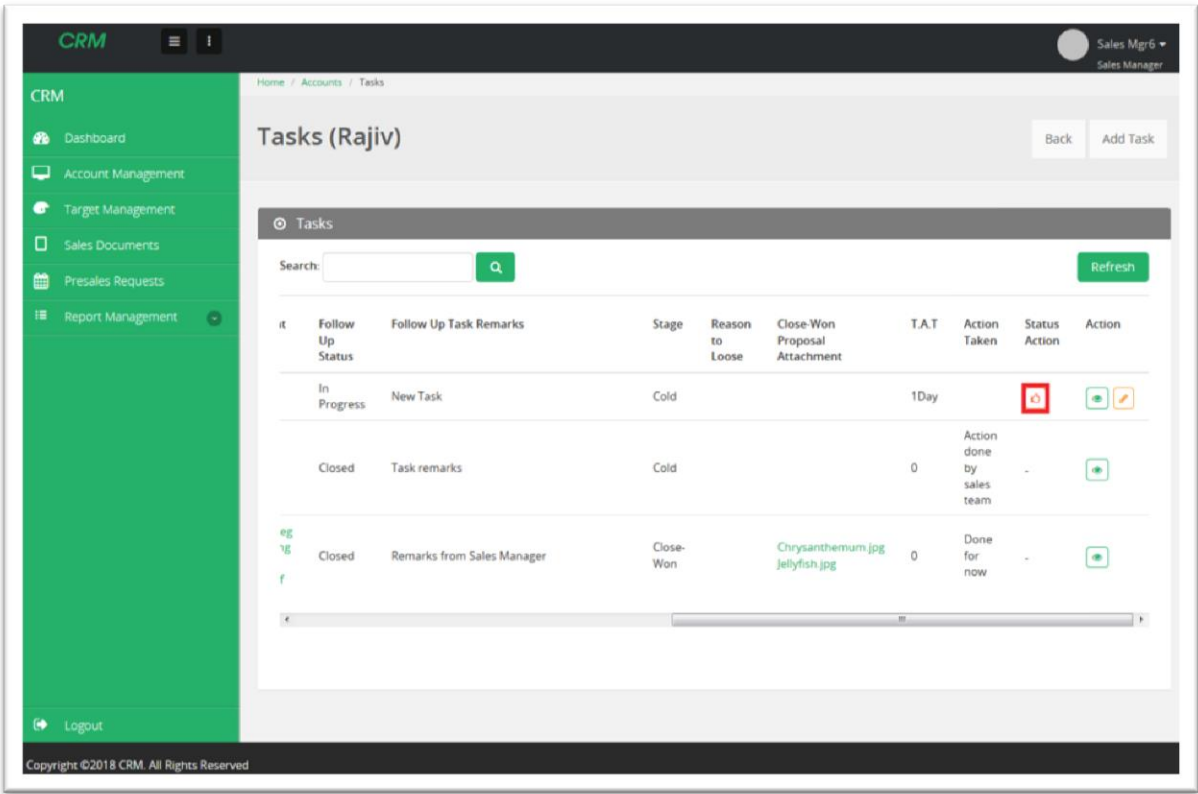
Logout

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- 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 system. The form is titled 'Edit Task' and has a 'Back' button in the top right corner. The form contains the following fields:

- 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 is visible on the left, and the footer shows 'Copyright ©2018 CRM. All Rights Reserved'.

3.11. View Task

a. To view product click on the View Icon

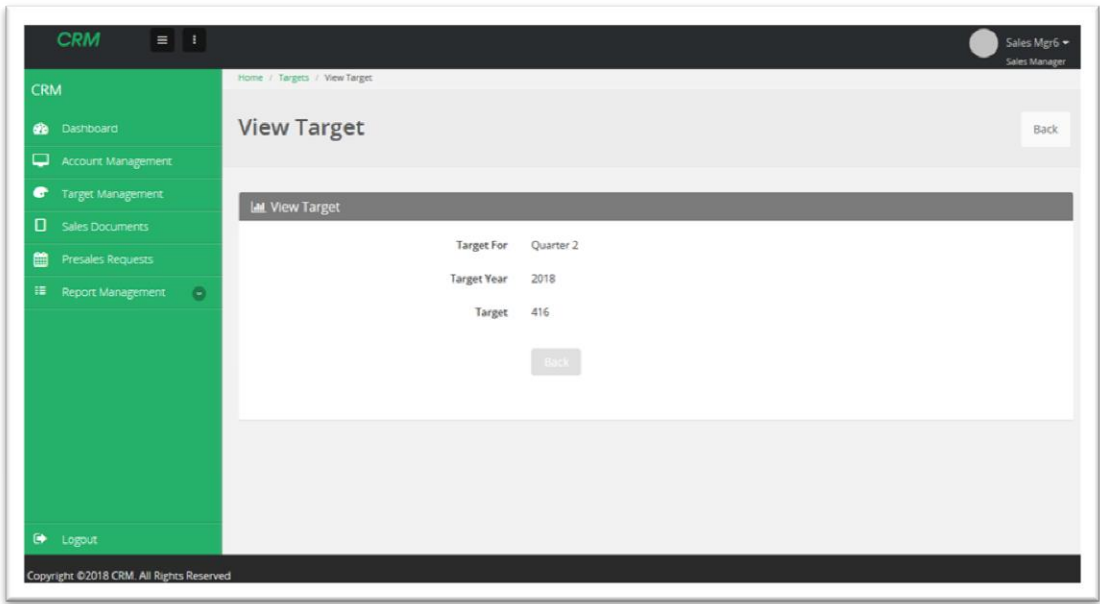
The screenshot shows the 'Tasks (Rajiv)' view in the CRM system. It includes a search bar, a 'Refresh' button, and a table of tasks. The table has the following columns: Follow Up Status, Follow Up Task Remarks, Stage, Reason to Loose, Close-Won Proposal Attachment, TAT, Action Taken, Status Action,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

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 is visible on the left, and the footer shows 'Copyright ©2018 CRM. All Rights Reserved'.

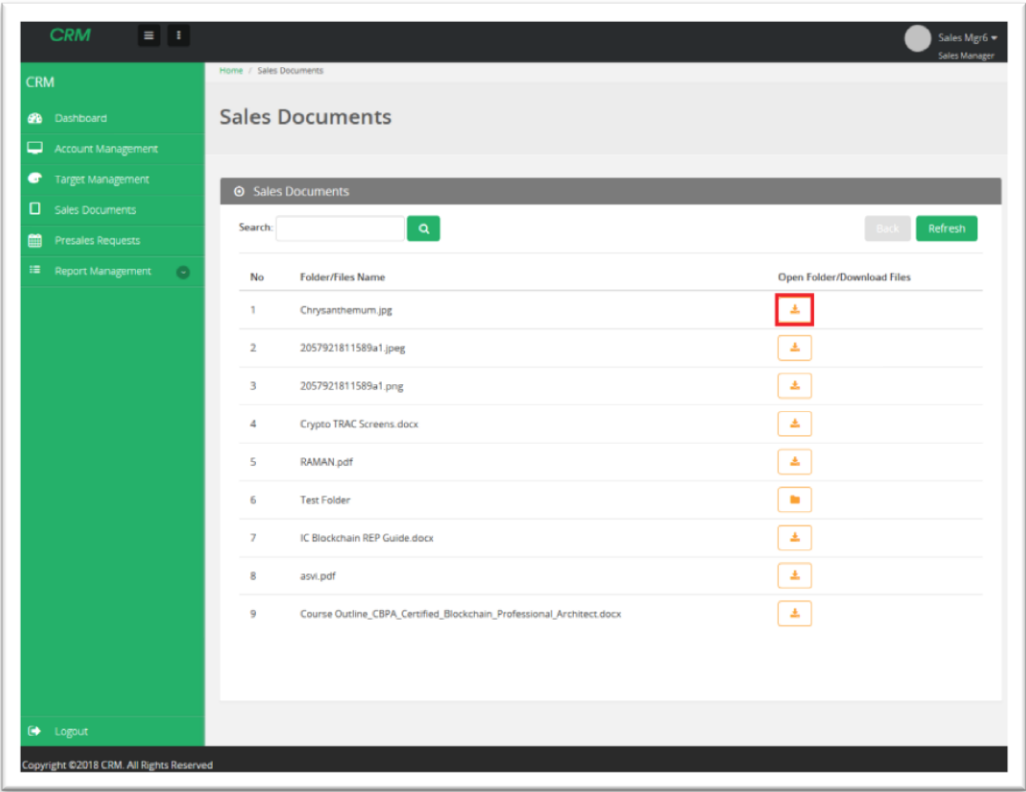
4. Target Management

- 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 



5. Sales Documents

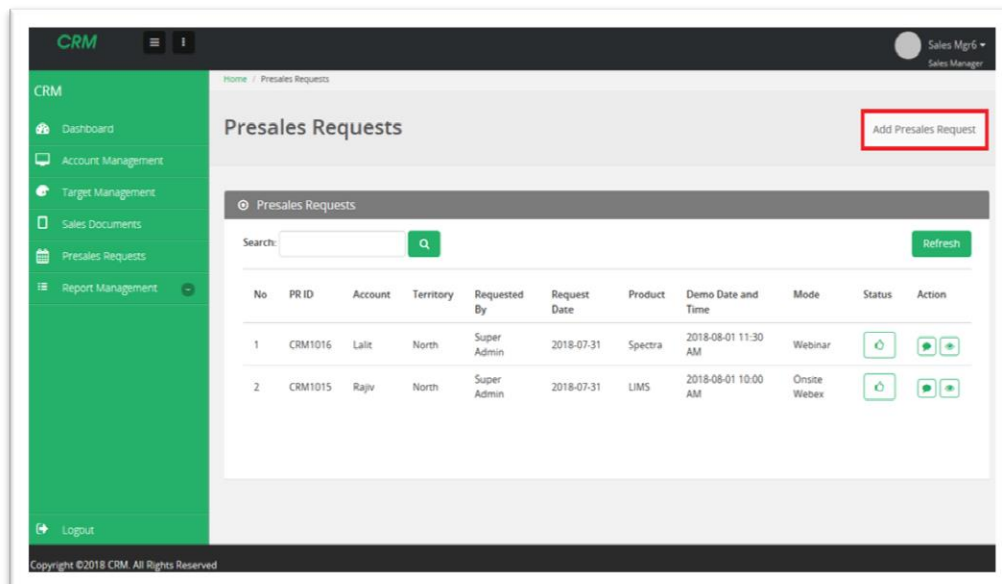
- a. Sales Head can Create Folder and Upload Files. Sales Manager can Open Folder/Download Files by clicking on 



6. Presales Requests

6.1.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

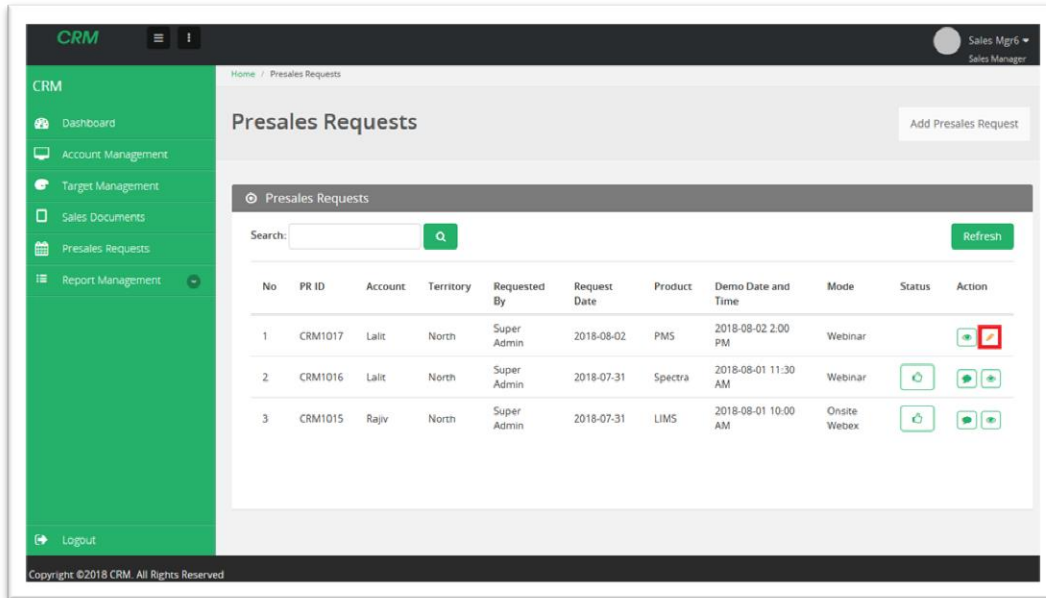
The screenshot shows the 'Add Presales Request' form in the CRM. The form includes the following fields:

- Account* (Dropdown menu)
- Territory (Text input)
- Business Model (Text input)
- Date of Request (Text input, value: 2018-08-02)
- Customer Attendees and Designation* (Text area)
- Product* (Dropdown menu)
- Date of Demo with Time (Text input, value: 2018-08-02 11:15 AM)
- Mode of Demo* (Dropdown menu)
- Demo Link(if applicable) (Text input, placeholder: URL with https:// or http://)
- Sales SPOC* (Dropdown menu, highlighted with a red box)
- Sales First level Demo done (Radio buttons: Yes, No)
- What Customer is looking for / Current Challenges* (Text area)
- Sales Comments* (Text area)

At the bottom of the form are 'Submit' and 'Back' buttons.

6.2.Edit Presales Request

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

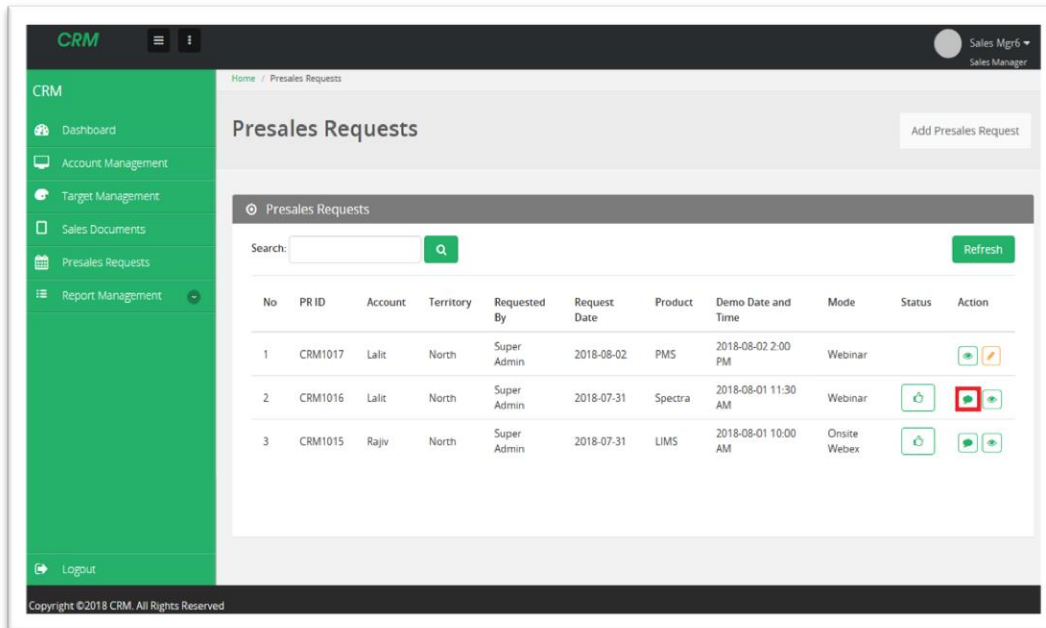


The screenshot shows the CRM interface with a sidebar on the left containing links to Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, and Report Management. The main content area is titled 'Presales Requests' and includes a search bar, a 'Refresh' button, and a table of requests.

No	PR ID	Account	Territory	Requested By	Request Date	Product	Demo Date and Time	Mode	Status	Action
1	CRM1017	Lalit	North	Super Admin	2018-08-02	PMS	2018-08-02 2:00 PM	Webinar		
2	CRM1016	Lalit	North	Super Admin	2018-07-31	Spectra	2018-08-01 11:30 AM	Webinar		  
3	CRM1015	Rajiv	North	Super Admin	2018-07-31	LIMS	2018-08-01 10:00 AM	Onsite Webex		  

6.3.Add Sales Comments

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



The screenshot shows the CRM interface with a sidebar on the left containing links to Dashboard, Account Management, Target Management, Sales Documents, Presales Requests, and Report Management. The main content area is titled 'Presales Requests' and includes a search bar, a 'Refresh' button, and a table of requests.

No	PR ID	Account	Territory	Requested By	Request Date	Product	Demo Date and Time	Mode	Status	Action
1	CRM1017	Lalit	North	Super Admin	2018-08-02	PMS	2018-08-02 2:00 PM	Webinar		 
2	CRM1016	Lalit	North	Super Admin	2018-07-31	Spectra	2018-08-01 11:30 AM	Webinar		  
3	CRM1015	Rajiv	North	Super Admin	2018-07-31	LIMS	2018-08-01 10:00 AM	Onsite Webex		  

7. Report Management

7.1.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 summary 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 includes 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 interface for generating Employee Reports. The sidebar on the left lists various CRM functions. The main area is titled 'Employee Reports' and includes a 'Search Report' section. This section contains three input fields: 'Employee*' (a dropdown menu), 'Target' (a dropdown menu currently showing '2018'), and 'YTD' (a checkbox). A green 'Search' button is positioned below these fields. Below the search section, there are three sections: 'Accounts', 'Tasks', and 'Sales', each displaying 'No Record Found'.

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

The screenshot displays the CRM interface for 'Employee Reports'. 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

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

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	reimar
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 Total : 553.00

Sales

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

Logout

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7.2.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 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			

8. Master Management

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

- a. 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 Dashboard 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 dashboard area features a 'Dashboard' header and a 'Sales Calendar' for August 2018. The calendar shows dates with various hospital names (e.g., Jehangir Hospital, Lilavati Hospital) and a 'PRS Hospital' entry. To the right of the calendar are several KPI cards: 'TOTAL EMPLOYEES' (7), 'TOTAL ACCOUNTS' (4), 'TARGET (QUARTER 2)' (60200000), 'FORECAST (QUARTER 2)' (70000), 'NEW (QUARTER 2)' (3), and 'IN PROGRESS (QUARTER 2)' (1). Below the Sales Calendar is a 'Presales Calendar' for August 2018, showing a 'Demo Completed' entry on August 10th. The footer includes a 'Logout' button and a copyright notice: 'Copyright ©2018 CRM. All Rights Reserved'.

- b. Only Admin and Sales Head can Add, Edit, View, Delete and Enable/Disable all the master fields.
- i. 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).
 - ii. To edit master fields (Territory, Designation, Product, Mode of Demo, Specialty, Lead Source and Account Status) click on Edit Icon 
 - iii. To view master fields (Territory, Designation, Product, Mode of Demo, Specialty, Lead Source and Account Status) click on View Icon 
 - iv. To delete master fields (Territory, Designation, Product, Mode of Demo, Specialty, Lead Source and Account Status) click on Delete Icon 
 - v. To enable/disable master fields (Territory, Designation, Product, Mode of Demo, Specialty, Lead Source and Account Status) click on Enable/Disable Icon 

9. Audit Log

Only Admin and Sales Head can see all the Logs.