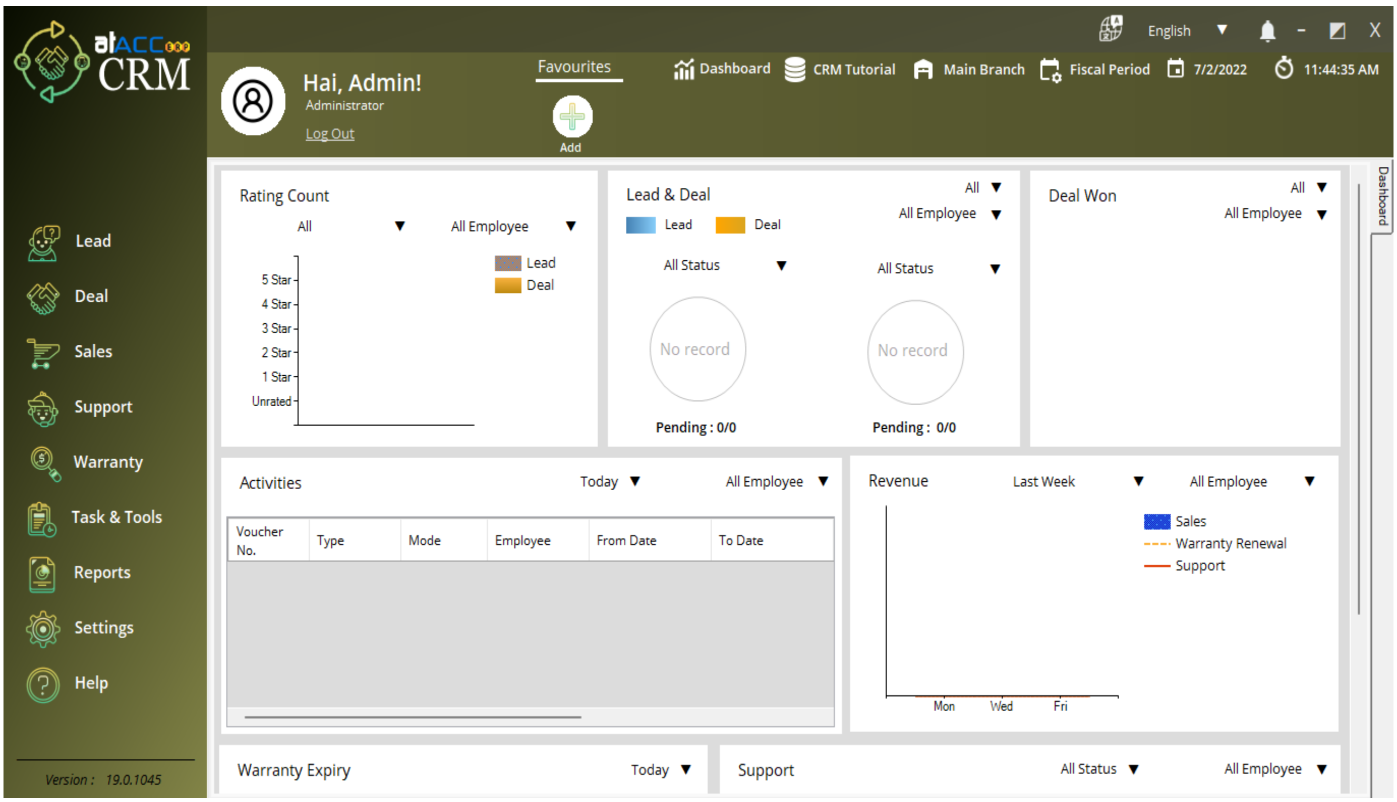
Customer Relationship Management

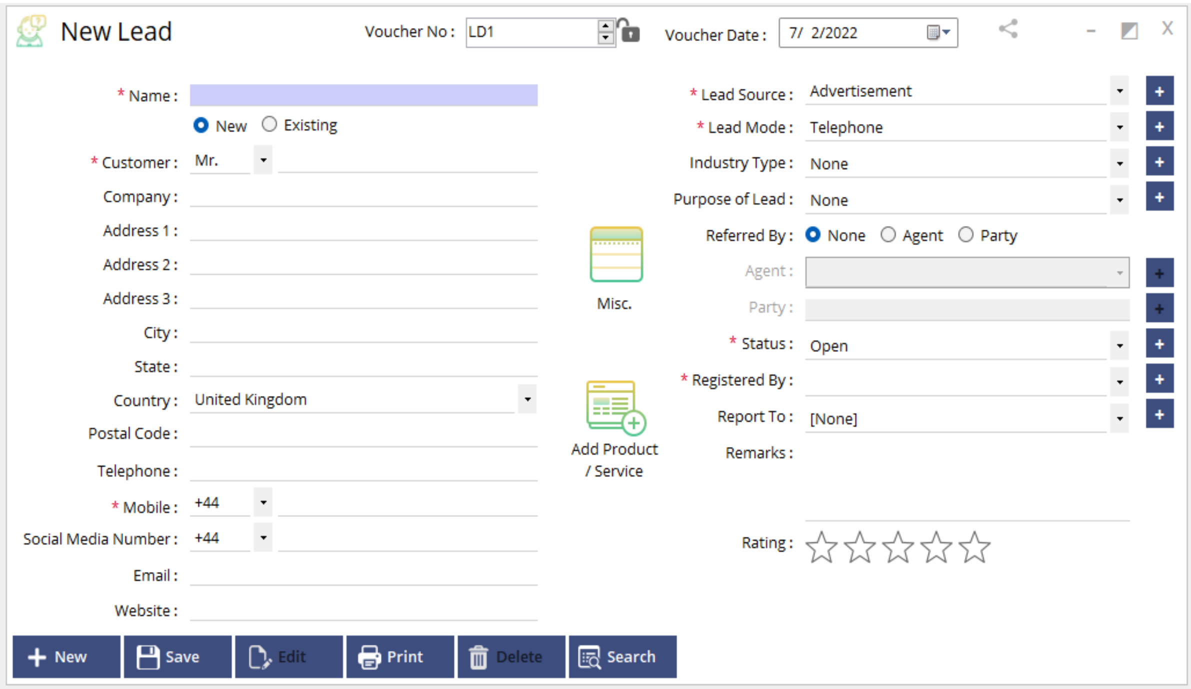
Introduction

atACC CRM at its core is a customer relationship management module, an application that helps you manage and track relationships with your leads, customers, and partners. It would focus on helping you manage sales leads and move them from point A to point B in your funnel.



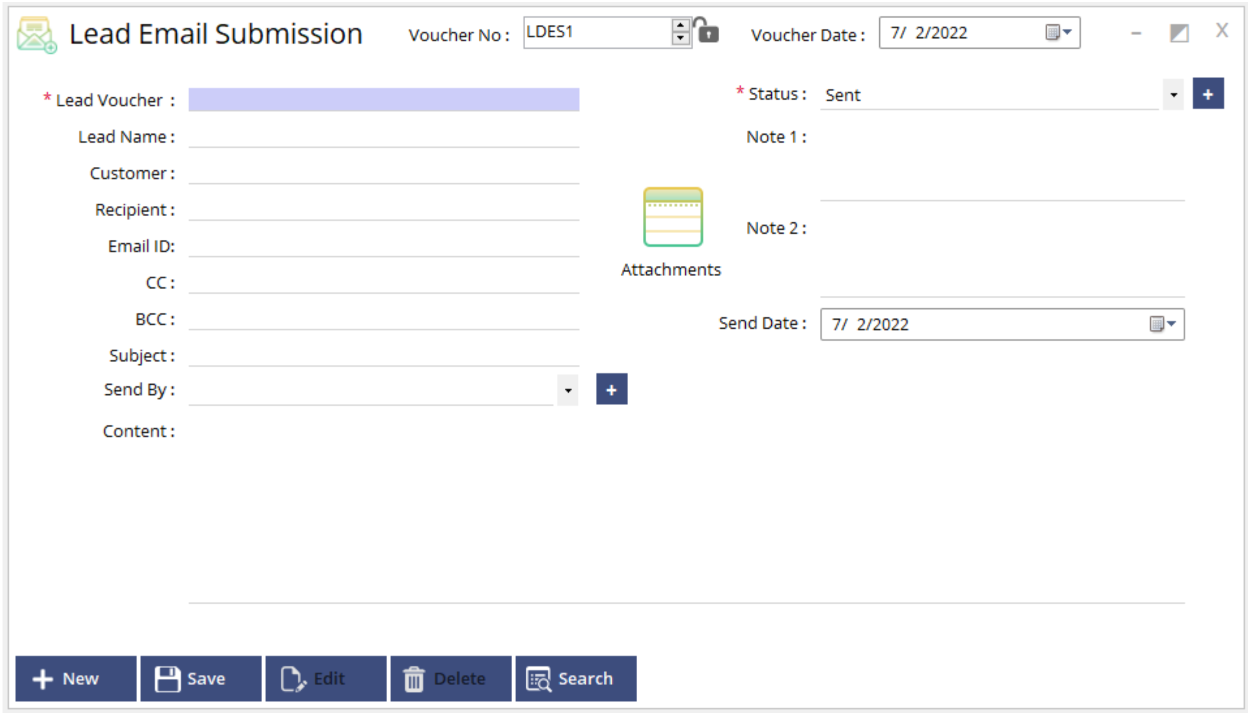
➢ Lead

1. New Lead



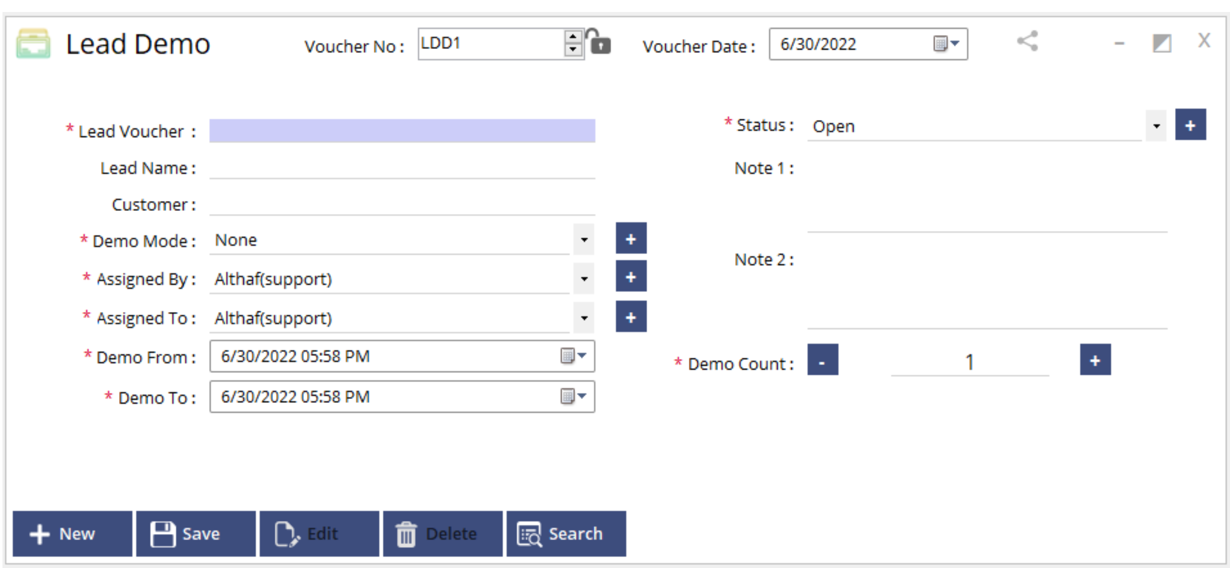
On this stage one can create new lead by choosing lead source, lead mode, purpose of lead etc. Also one can update status of a lead either open or close

2. Lead Email Submission



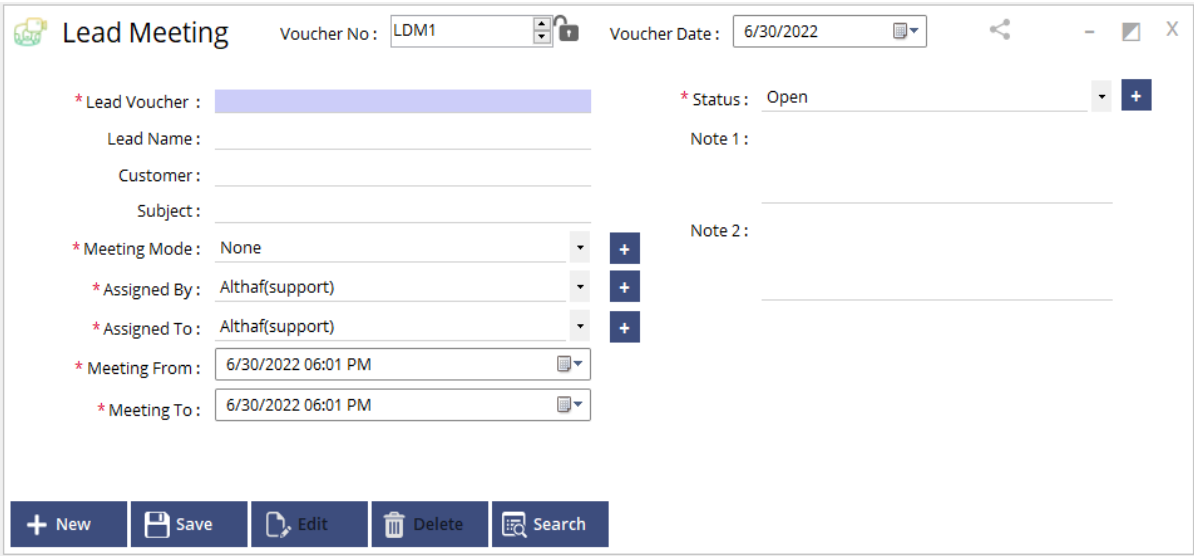
On this stage it update the communication we made by email by the following lead. Also on this window one can sent email by filling content, subject etc. along with email id

3. Lead Demo



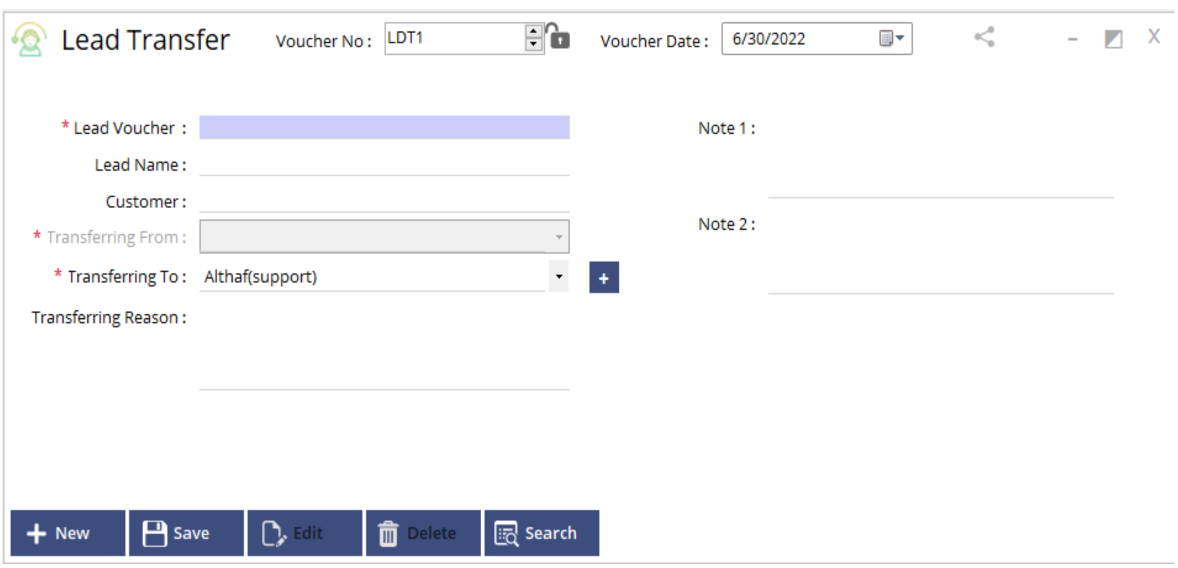
Lead demo can schedule demo based on lead received. Can set Demo mode, Assigned person, Date and time as well. It also record number of demo arranged for the particular customer.

4. Lead Meeting



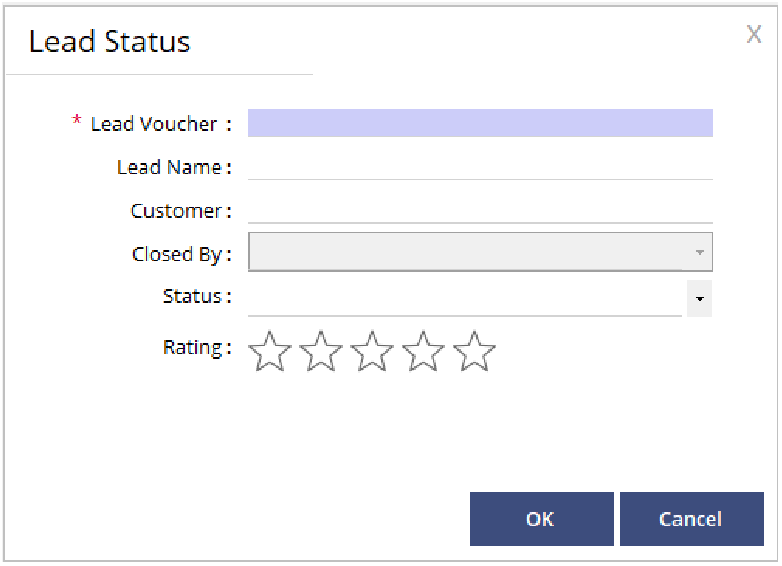
Here on this Stage we can schedule meeting if required. It includes meeting mode, Assigned person Date & Time. Also it store the status of meeting Open or Close.

5. Lead Transfer



On this stage if required we can transfer the lead to another employee with reason of transfer.

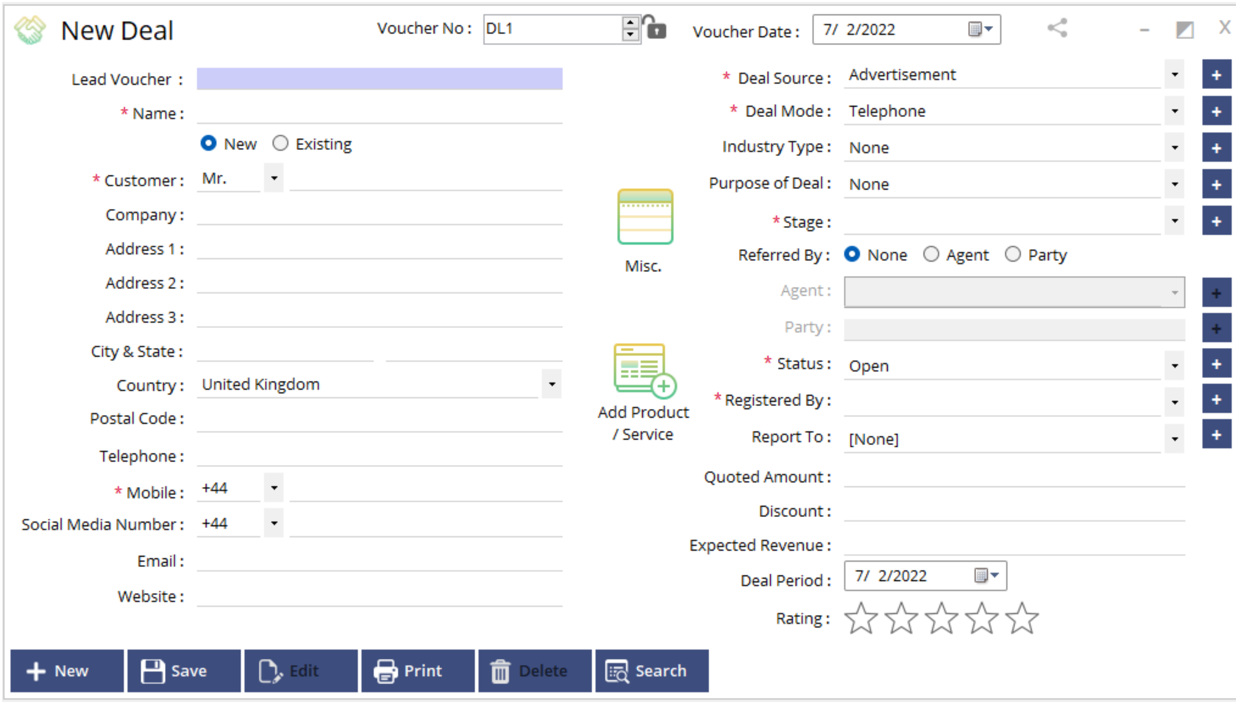
6. Lead Status



Lead status can update the current status of the lead either closed or open along with employee name who closed with rating.

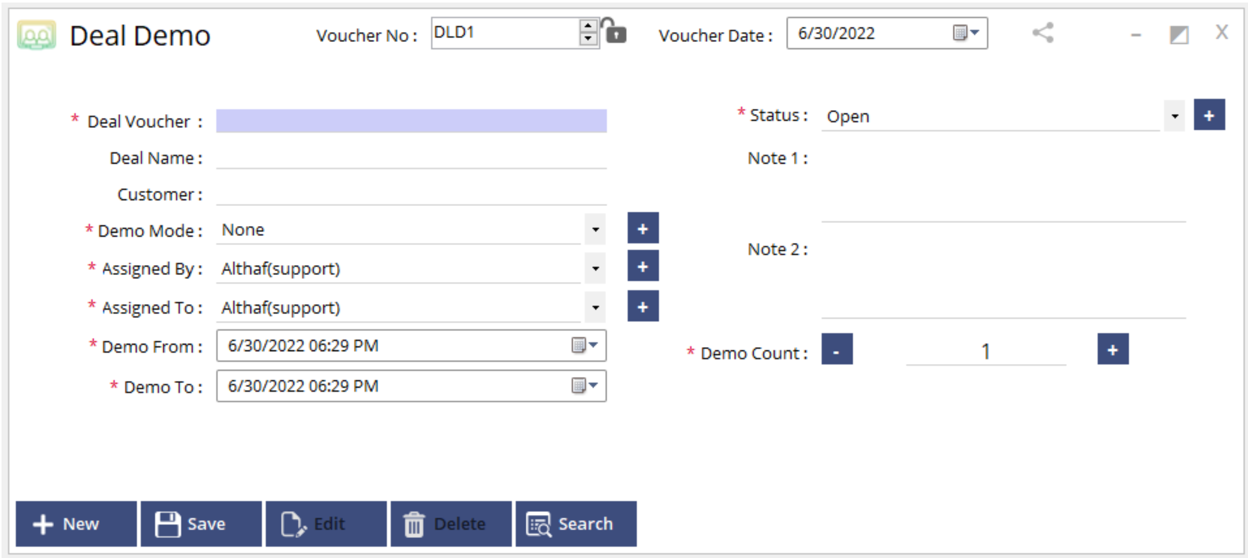
➢ Deal

1. New Deal



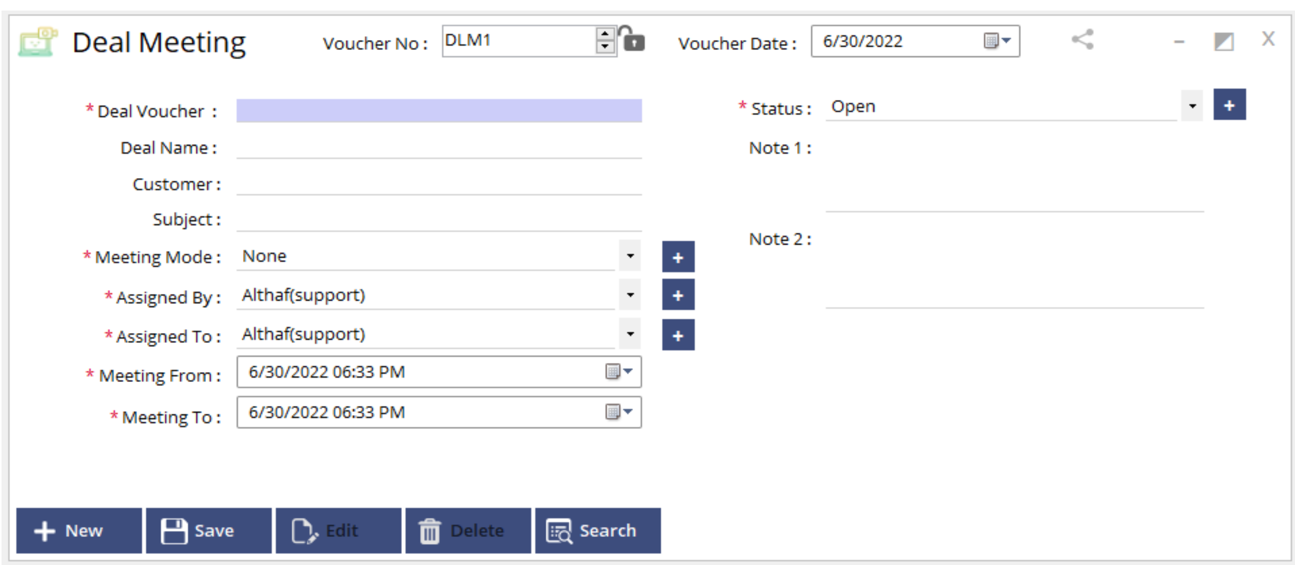
Here on this stage one can add deal by choosing Deal source, Deal mode, Deal stage, Referred by etc. along with deal status. Also can add product or service on the deal stage.

2. Deal Demo



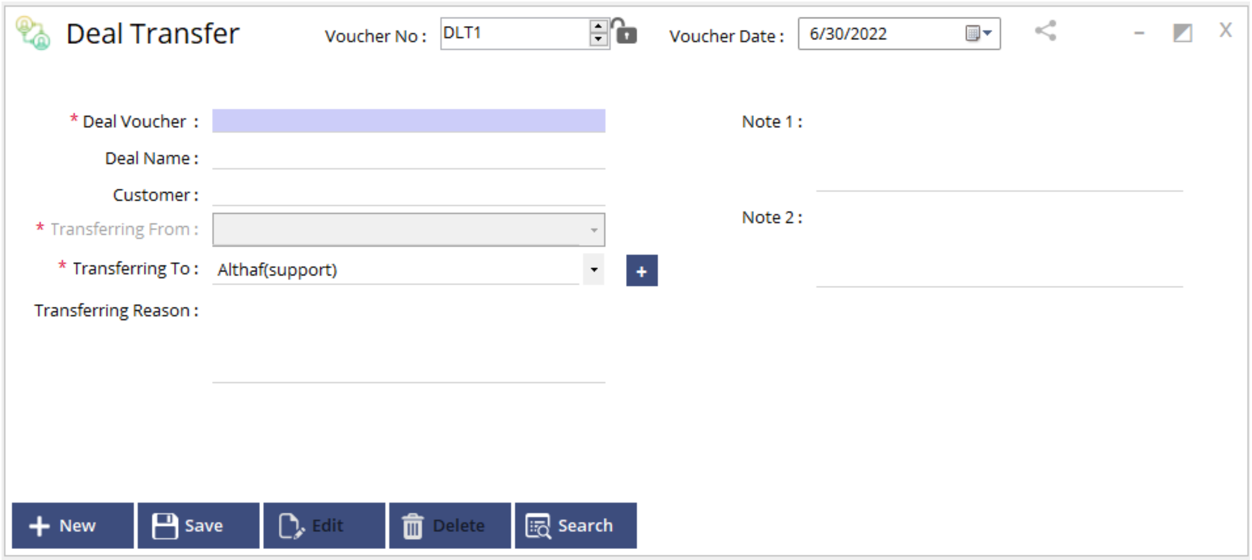
Deal demo can schedule demo based on deal received. Can set Demo mode, Assigned person, Date and time as well. It also record number of demo arranged for the particular customer.

3. Deal Meeting



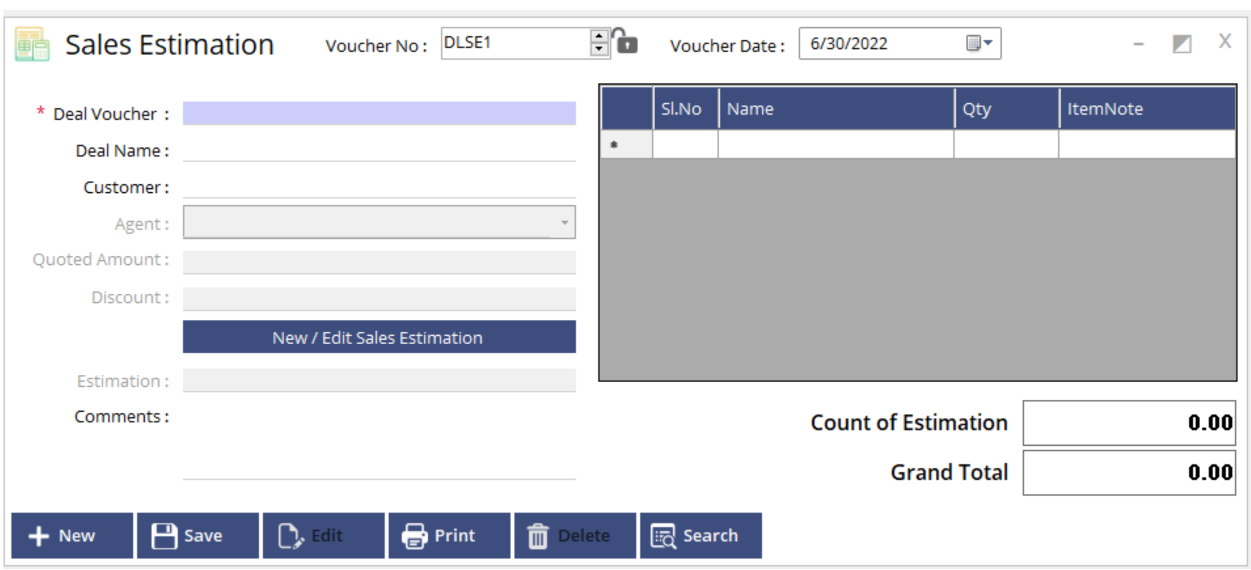
Here on this stage we can schedule meeting if required. It includes meeting mode, Assigned person Date & Time. Also it update the status of meeting Open or Close.

4. Deal Transfer



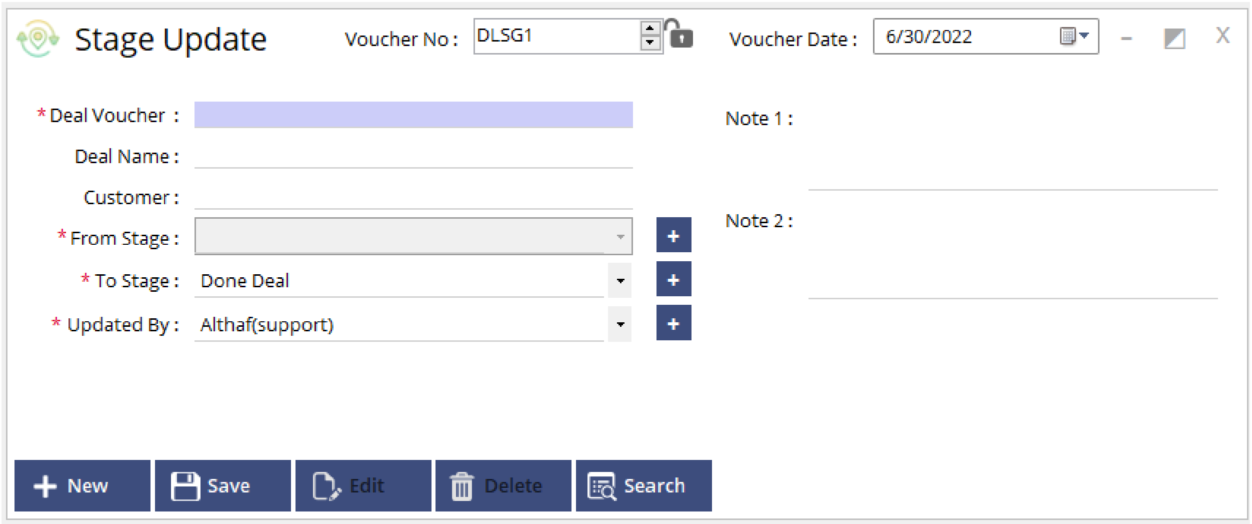
On this stage if required we can transfer the lead to another employee with reason of transfer.

5. Sales Estimation



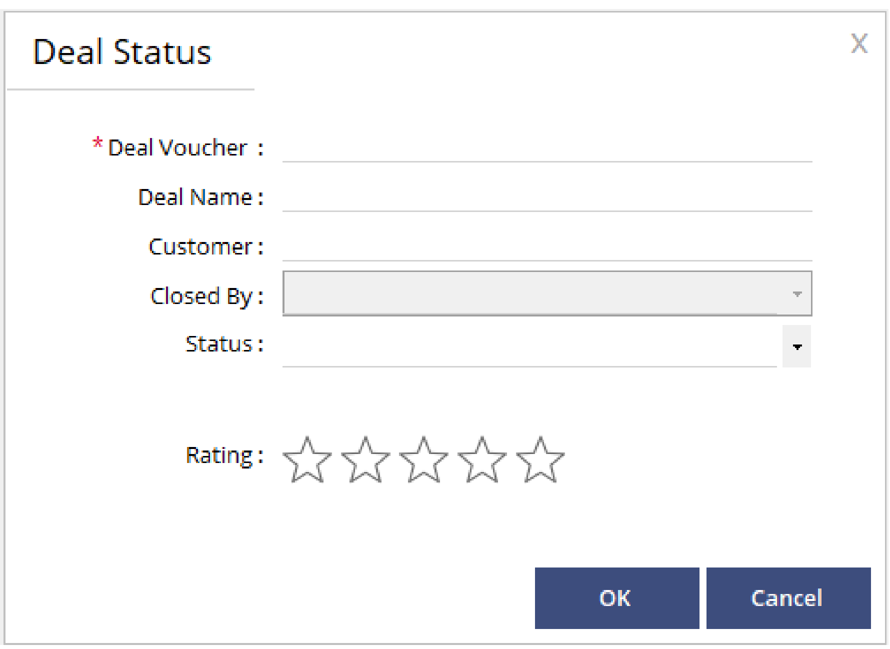
On this stage one can add product/service estimation.

6. Stage update



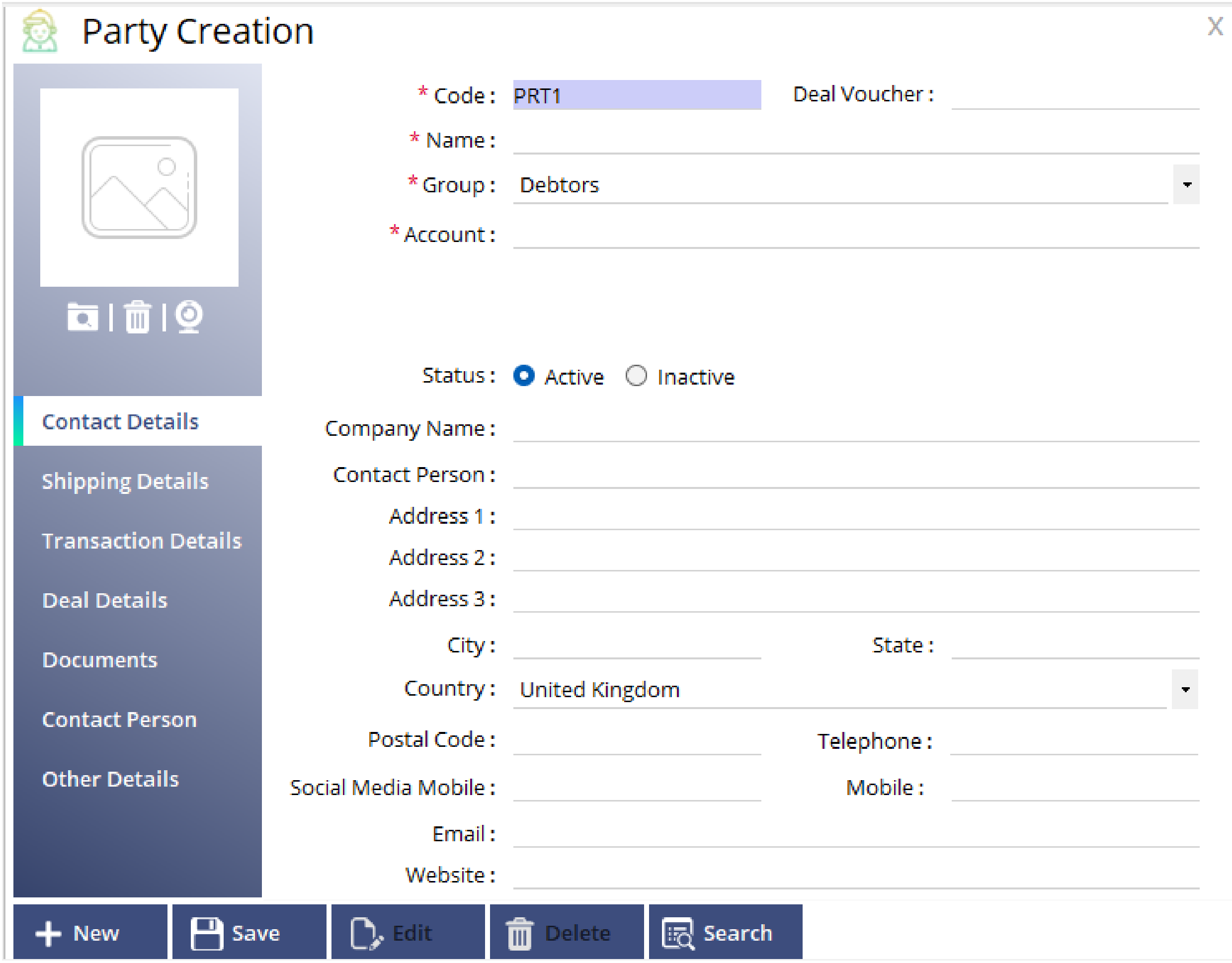
On this stage one can transfer one stage to another.

7. Deal Status



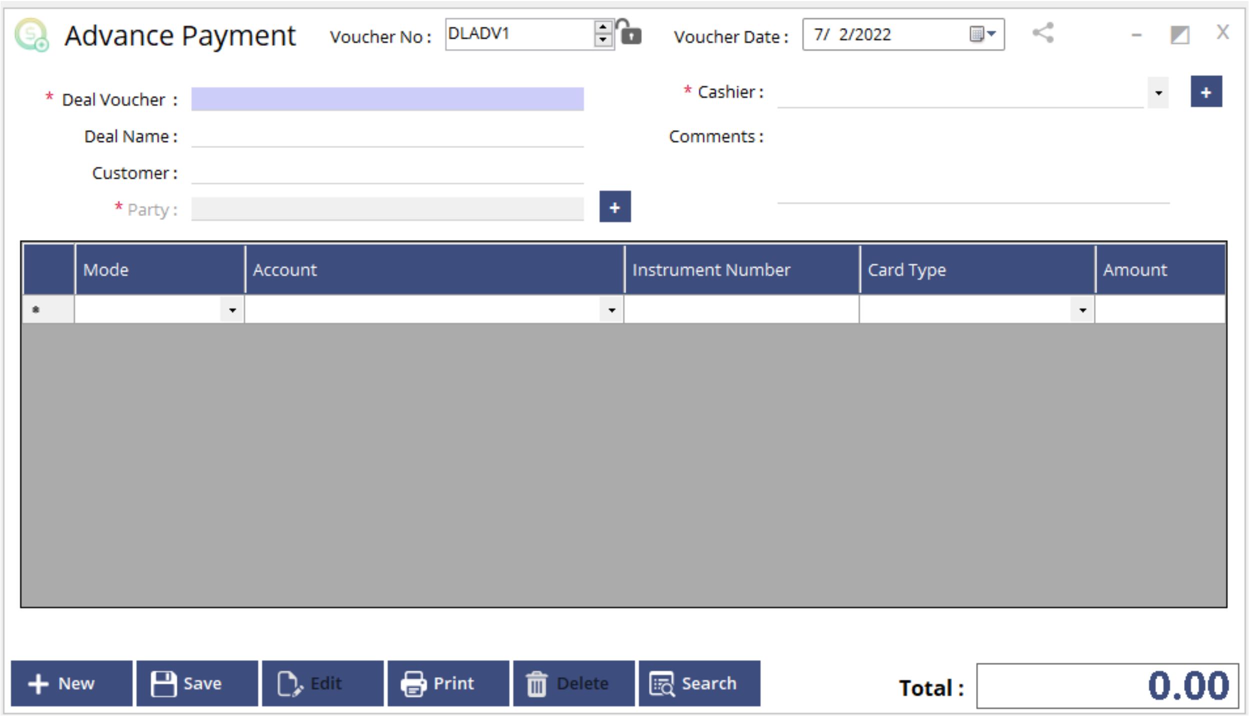
Deal status can update the current status of the deal either closed or open along with employee name who closed with rating.

8. Party Creation



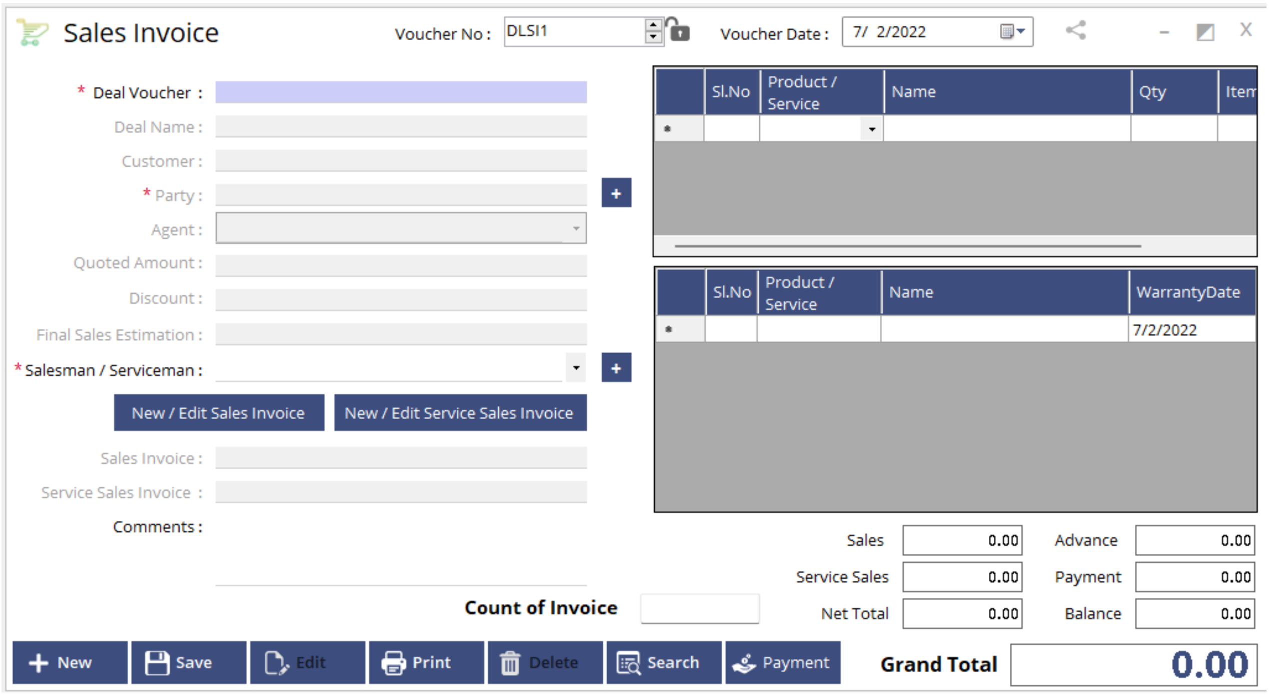
On this stage party can be created for further flow of the deal. It can attach documents as well

9. Advance Payment



On this stage one can receive advance payment from customer based on the deal followed.

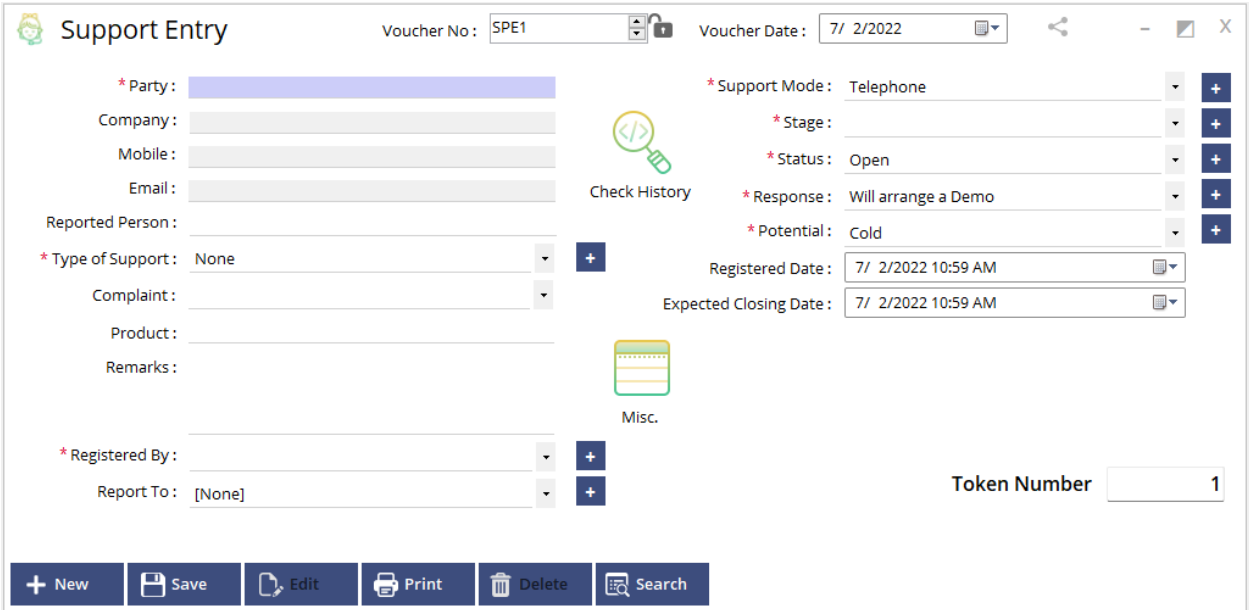
➢ Sales Invoice



On this stage one can add sales or service based on estimation. Also payment can be done from this window.

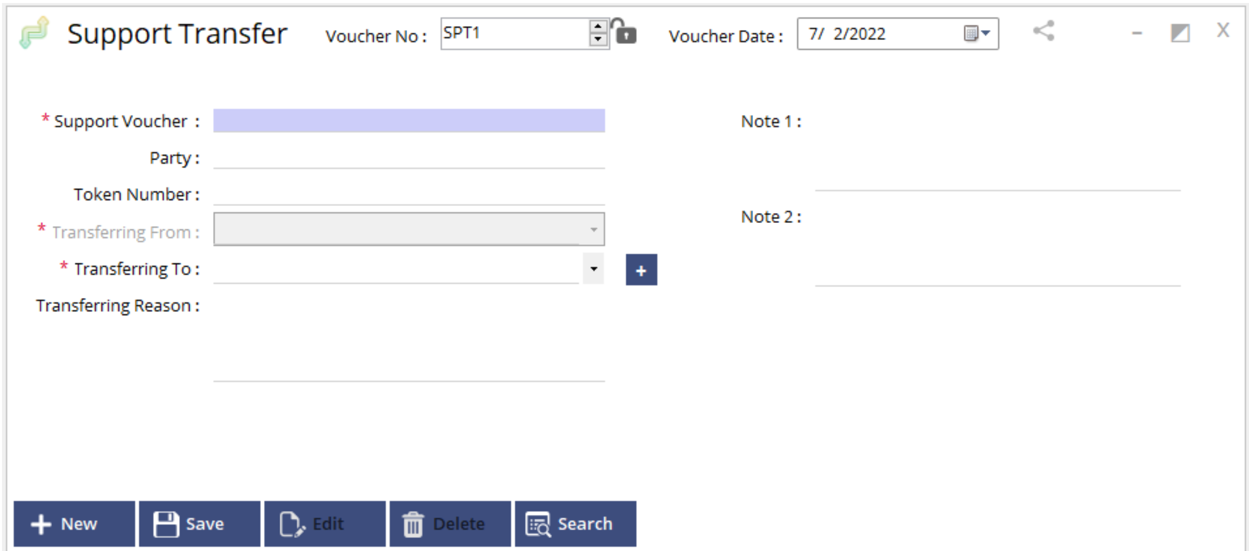
➢ Support

1. Support Entry



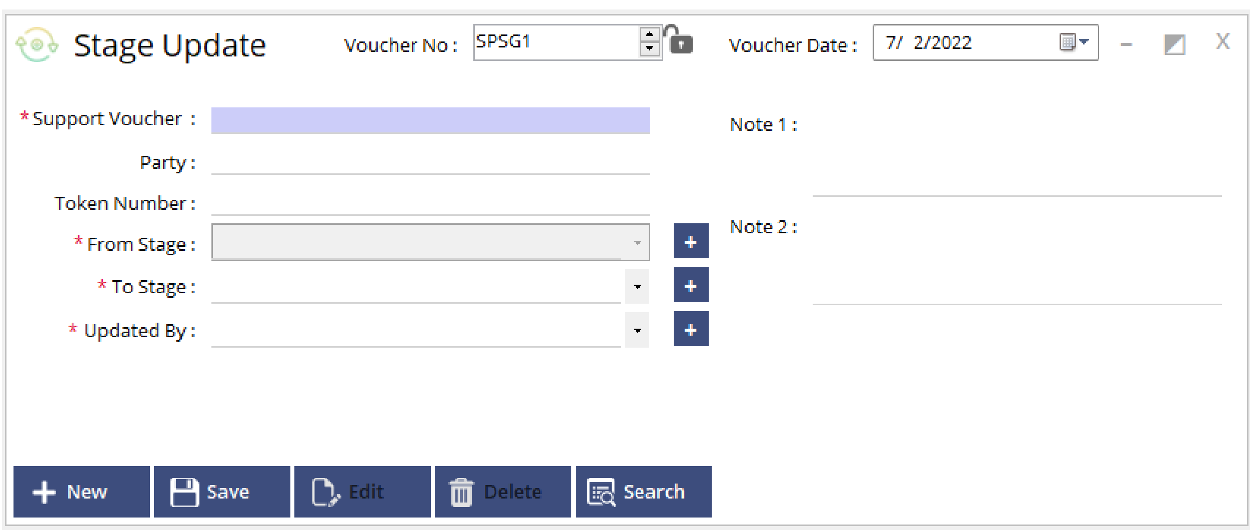
On this window one can enter support from customer after deal complete. Can record type of support, support mode, stage, status, whether closed or open along with the response and registered date as well. It also generate a token number based on support entry. Also can check previous support history of the same party.

2. <u>Support Transfer</u>



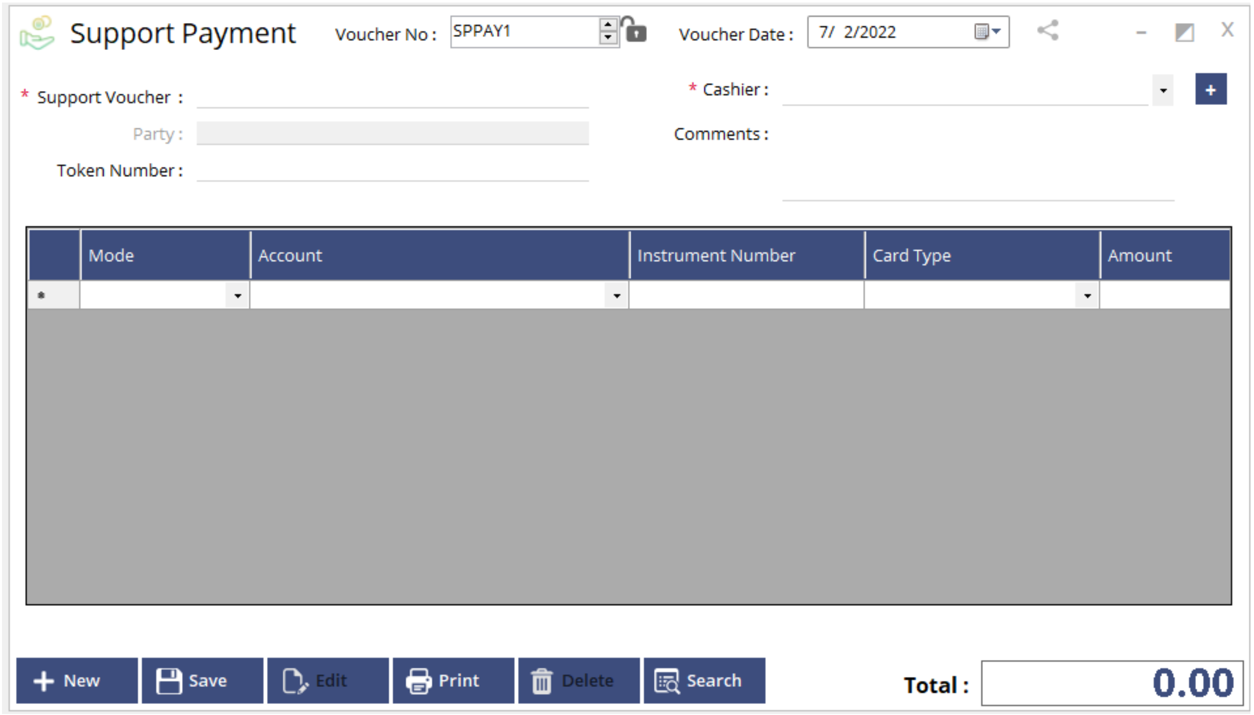
Here on this stage if required we can transfer support to another employee for changing department.

3. Stage update



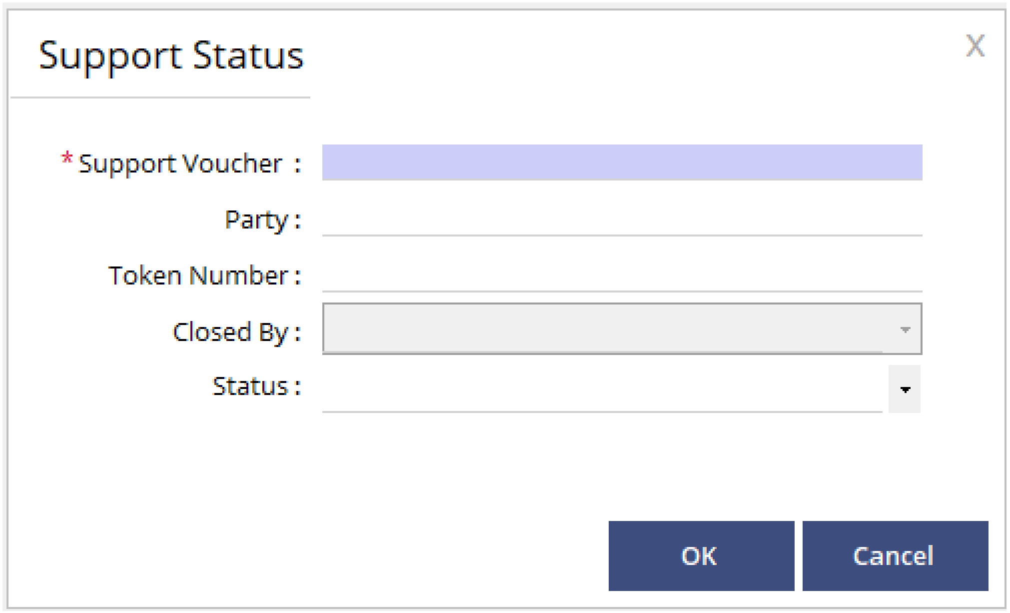
Here we can update stages for support flow.

4. Support Payment



Here we can collect payment for support if required with available mode of payment.

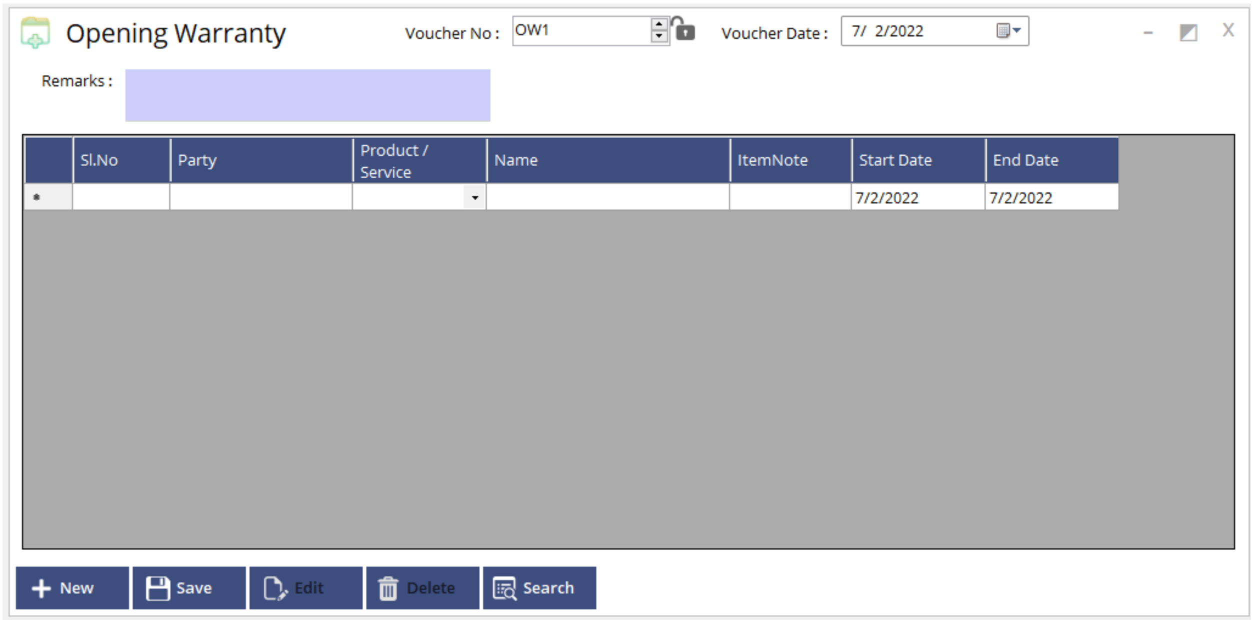
5. Support Status



Here we can update support status by open, close or pending.

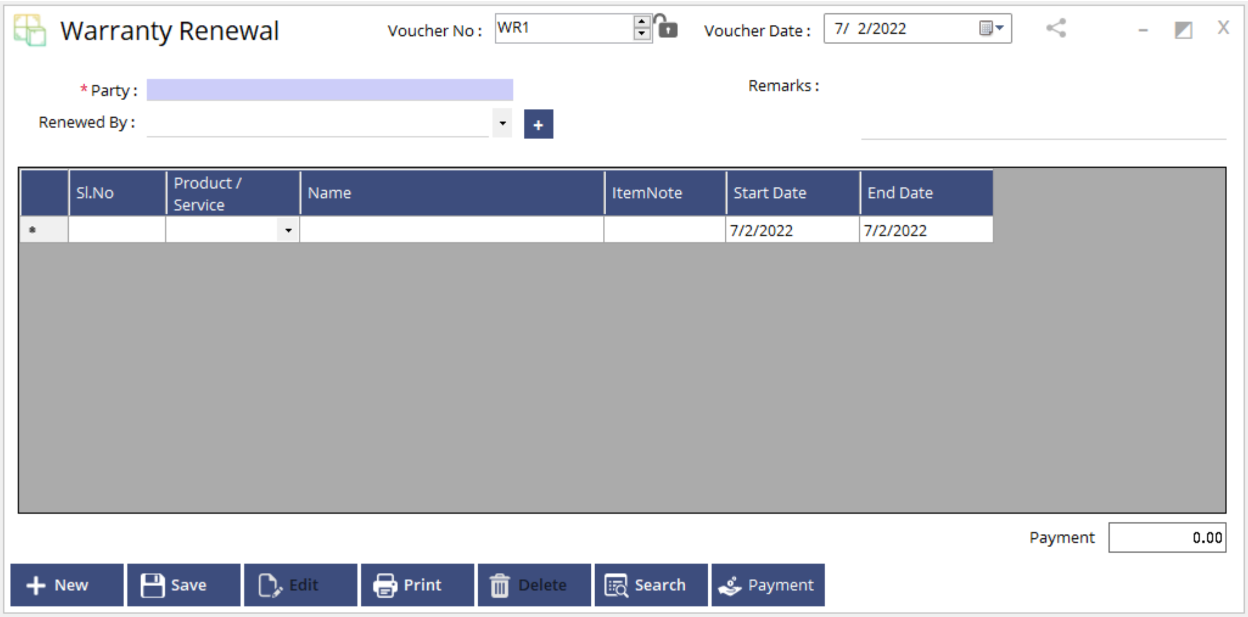
➢ Warranty

1. Opening warranty



Here we can input opening warranty of an existing party. It record start date and end date as well.

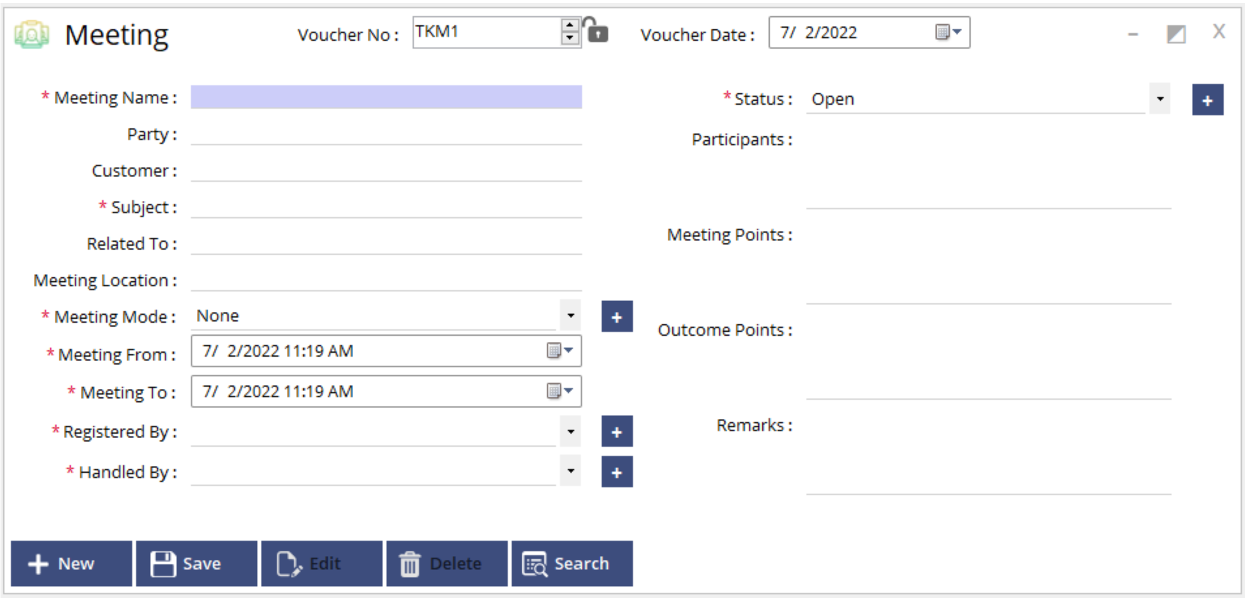
2. Warranty Renewal



Here on this window we can renew warranty of an ongoing support for product/service.

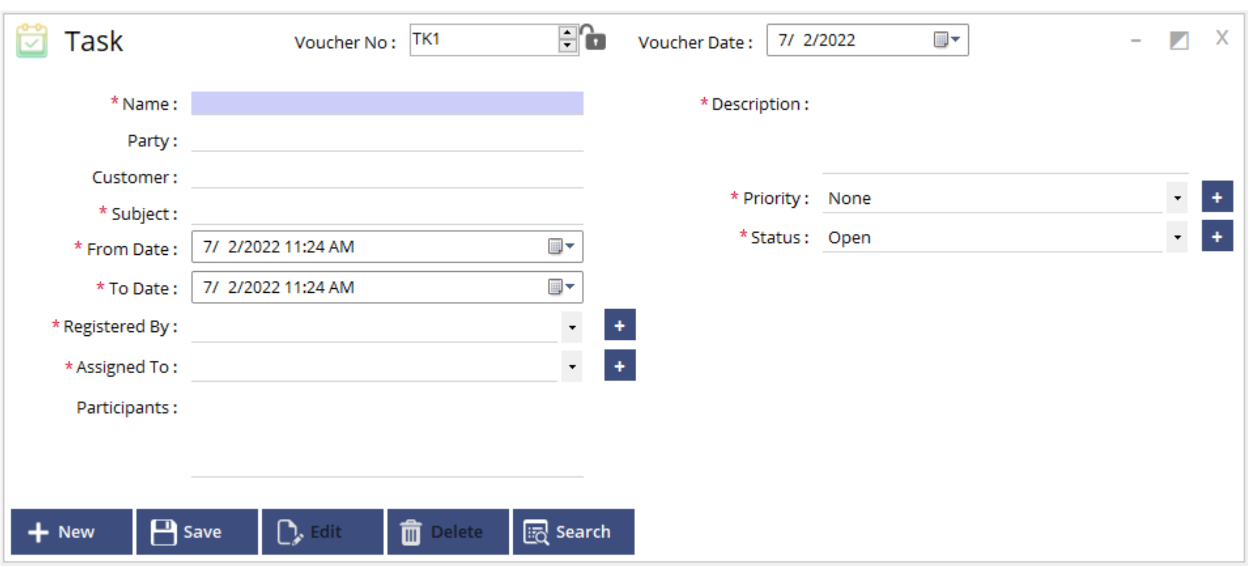
➢ Task and tools

1. Meeting



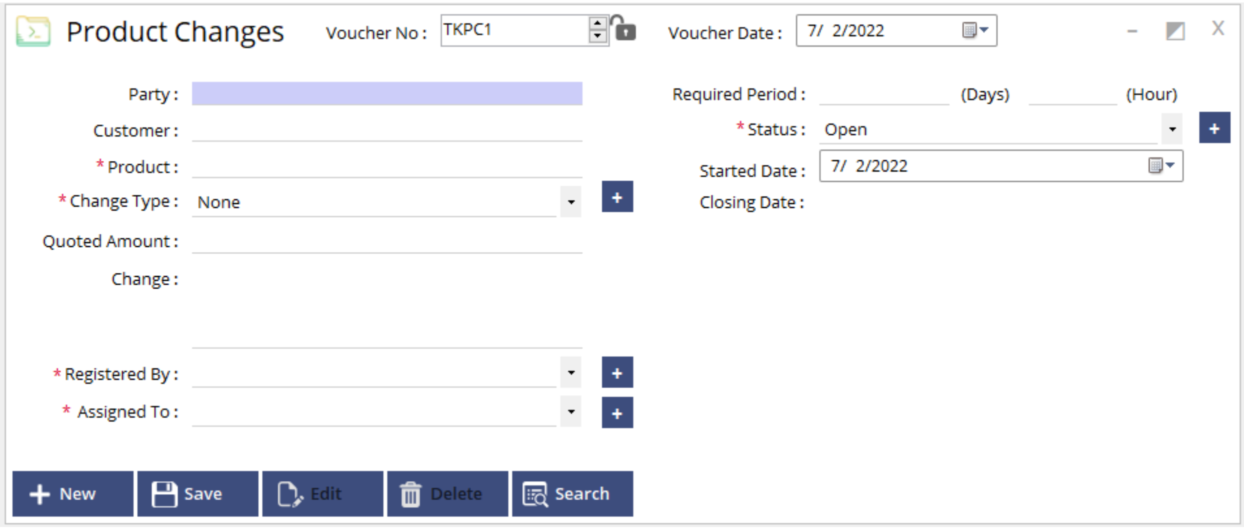
Here we can schedule meeting for customer to record meeting points, outcome points etc.

2. Task



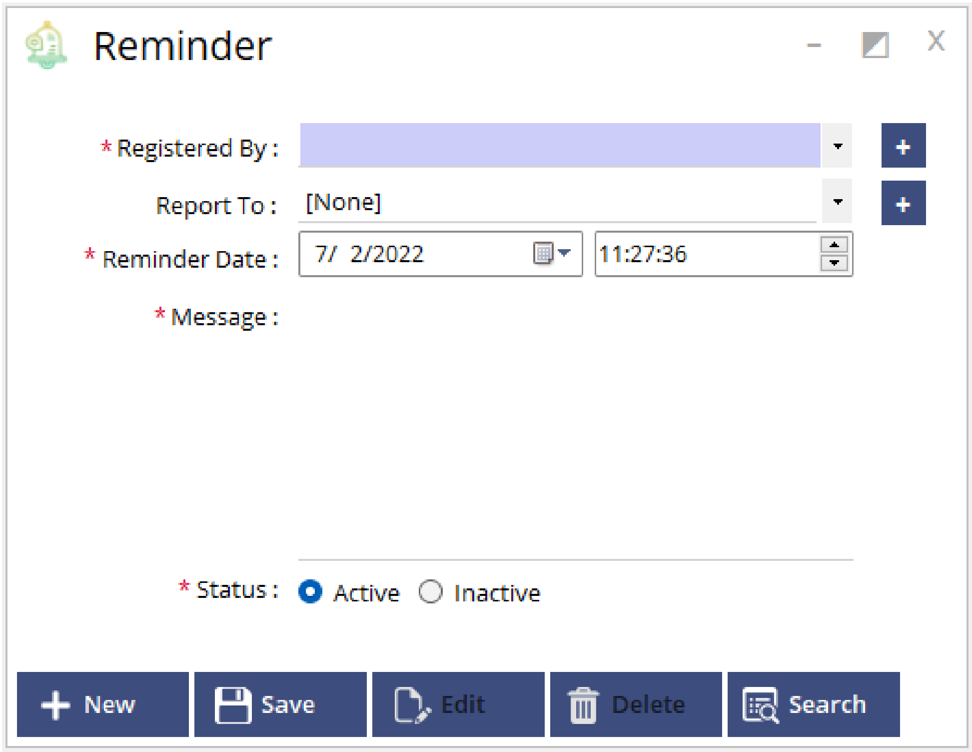
Here we can schedule tasks for customer.

3. Product Changes



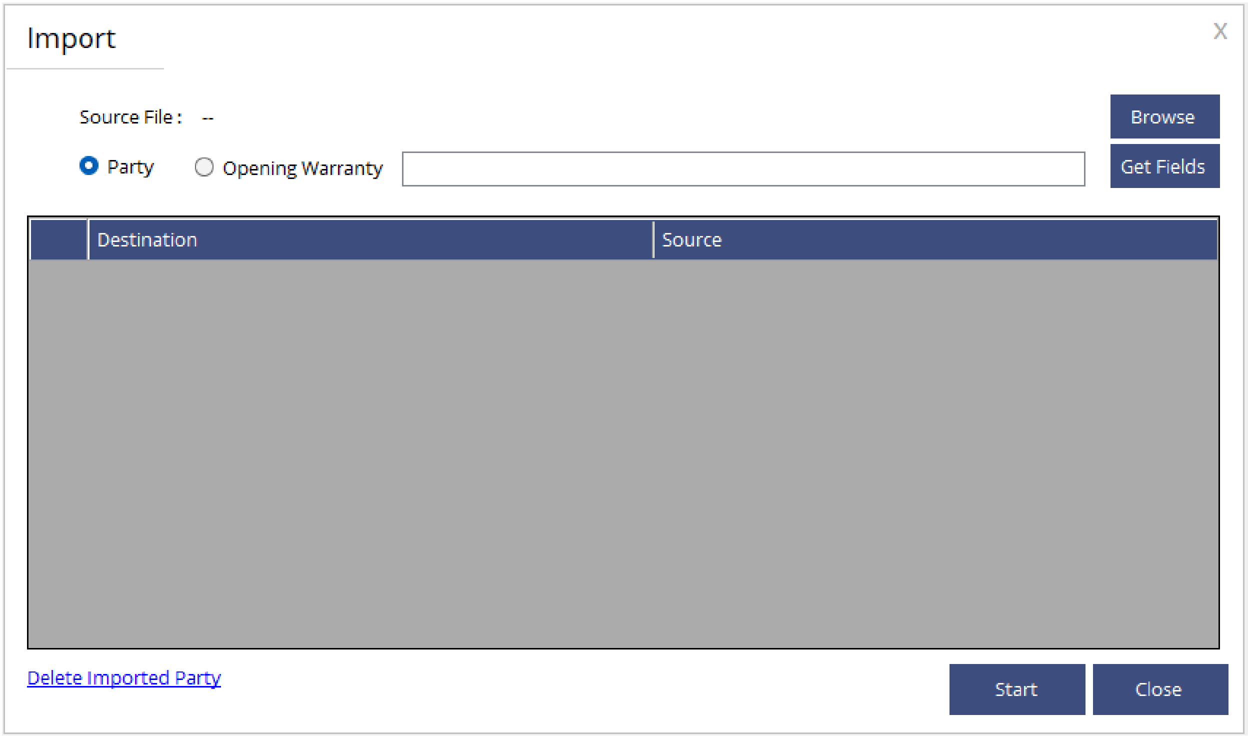
Here we can input requested changes/customization for product from customer. It can also mention the time and cost required to complete the change.

4. Reminder



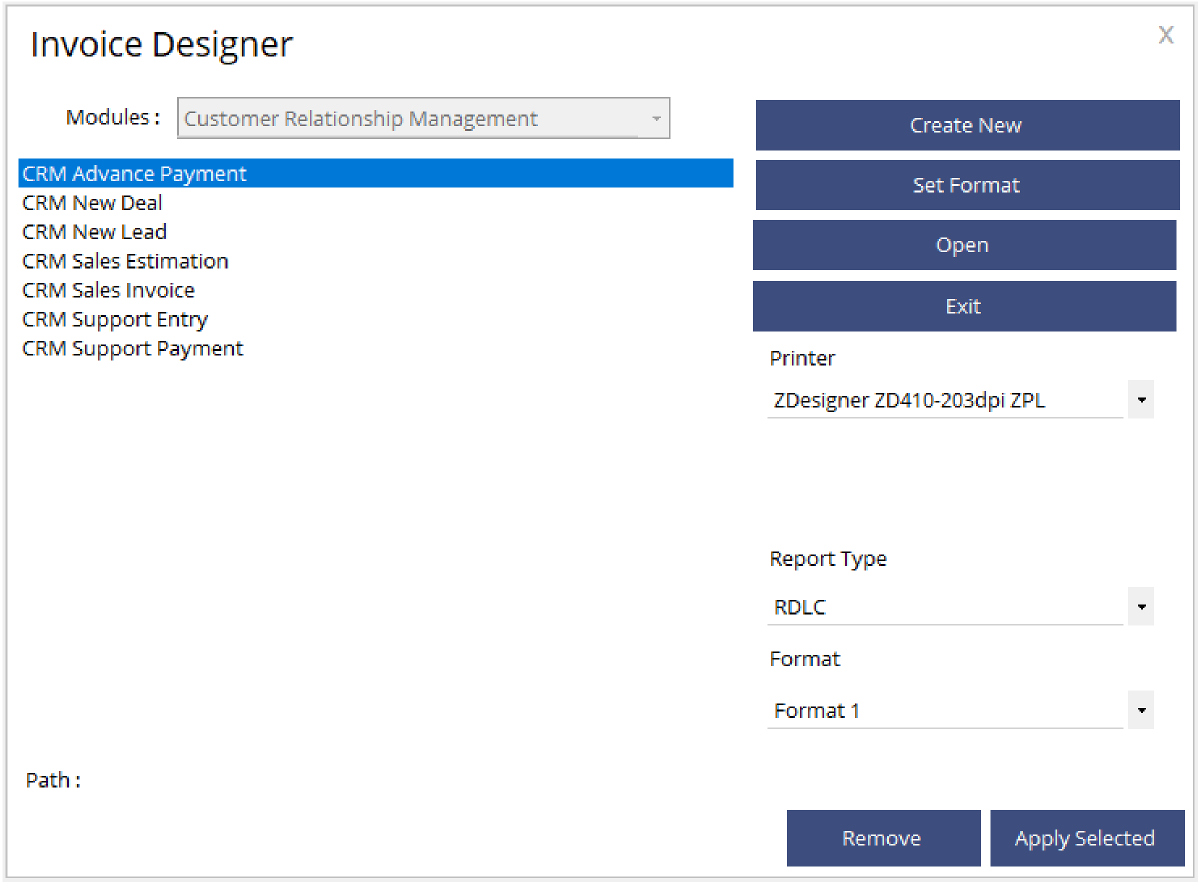
Here we can set a reminder for general perpose.it will notify on the reminder icon on dashboard.

5. Import



We can import opening warranty as a whole.

6. Invoice designer



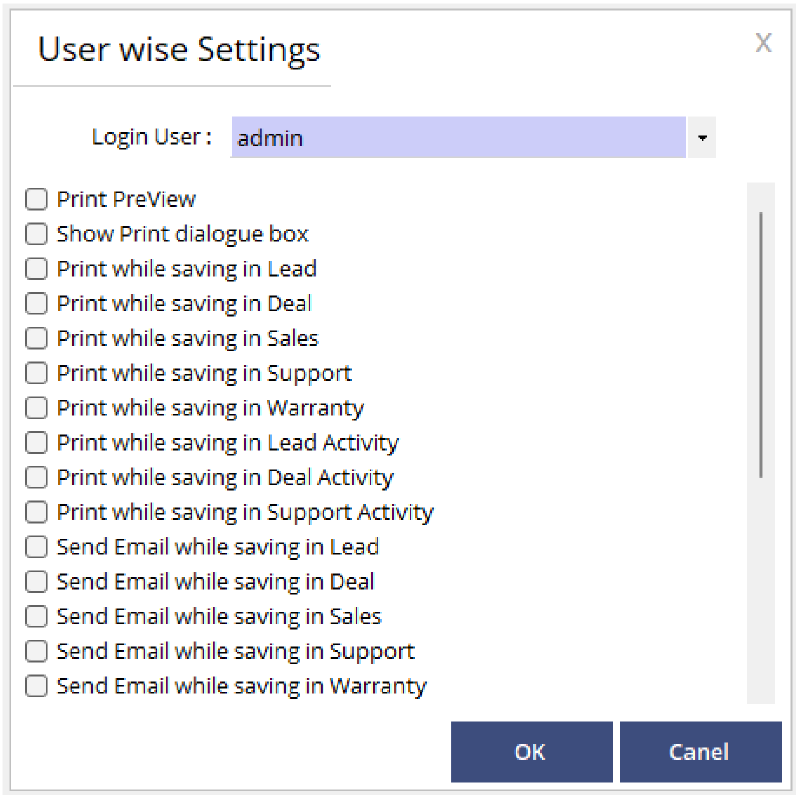
Here we can set print design on listed transactions.

➢ Reports

Report include Lead, Deal, CRM sales, Support, Warranty, Task and customer list.

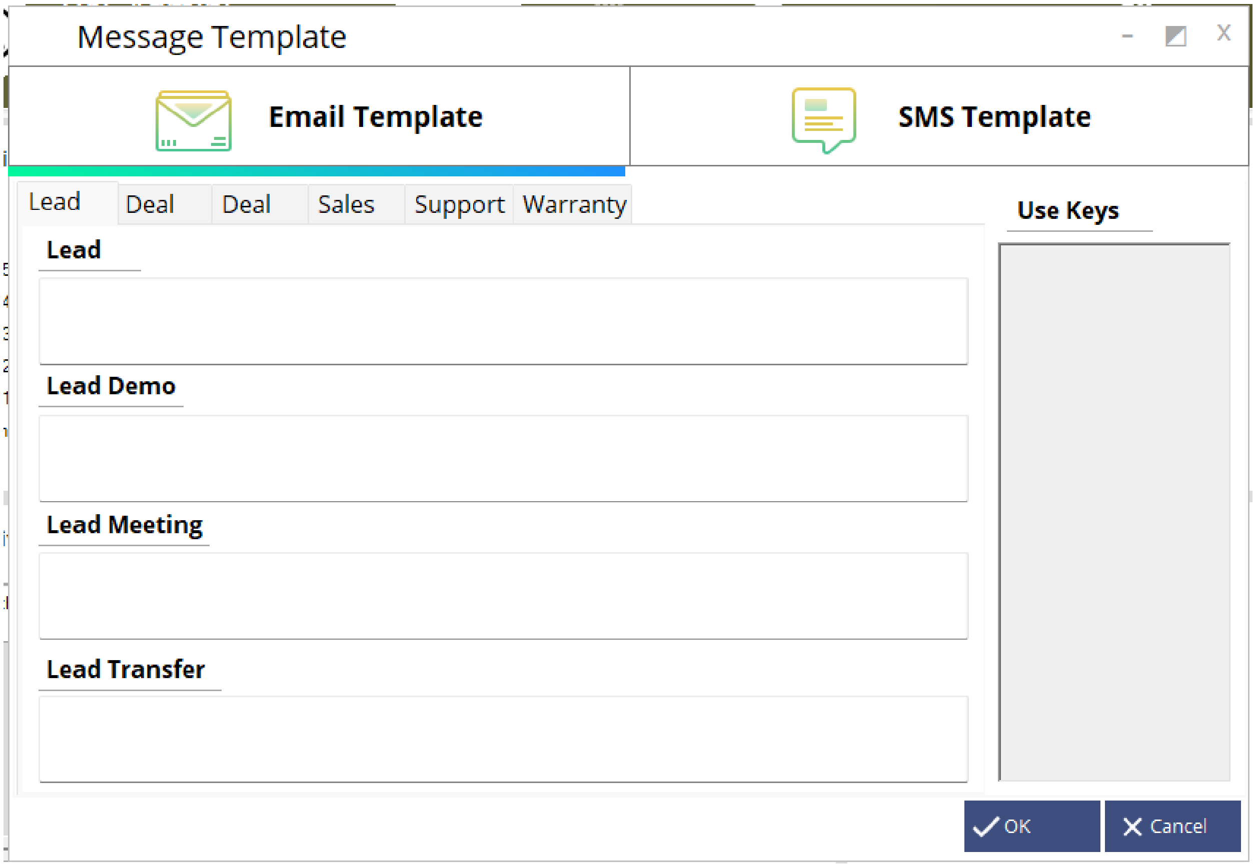
➢ Settings

1. User wise settings



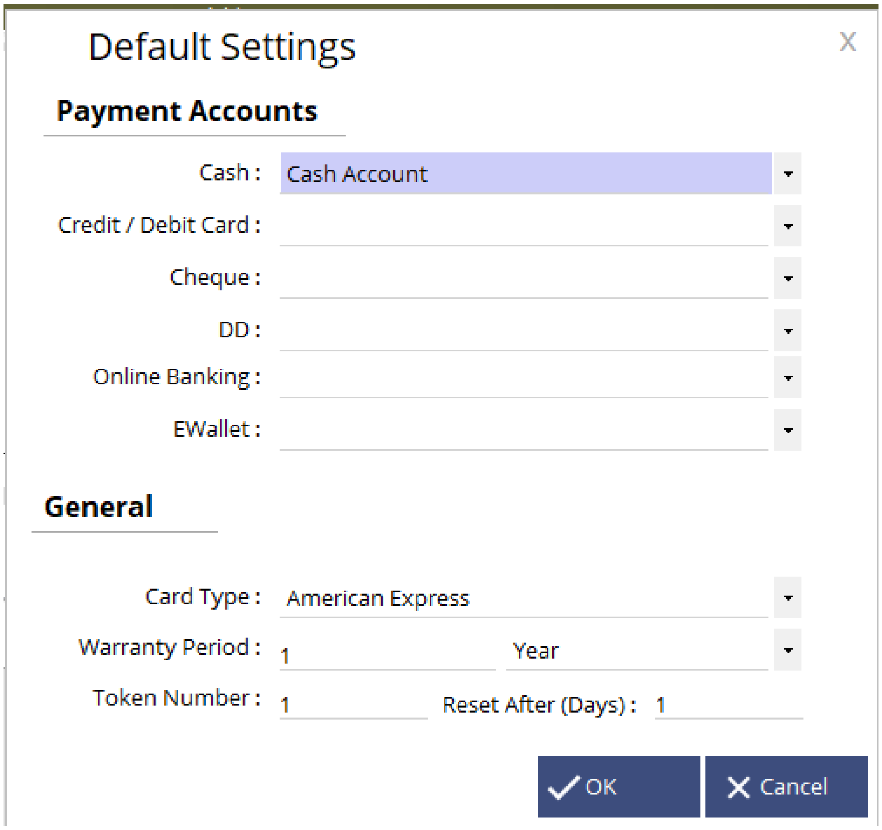
Can set user wise setting from the available list.

2. Message Template



Can set Email and SMS template for lead, deal, sales, support and warranty.

3. Default settings



Default setting can be set on this window including warranty period, token number etc.