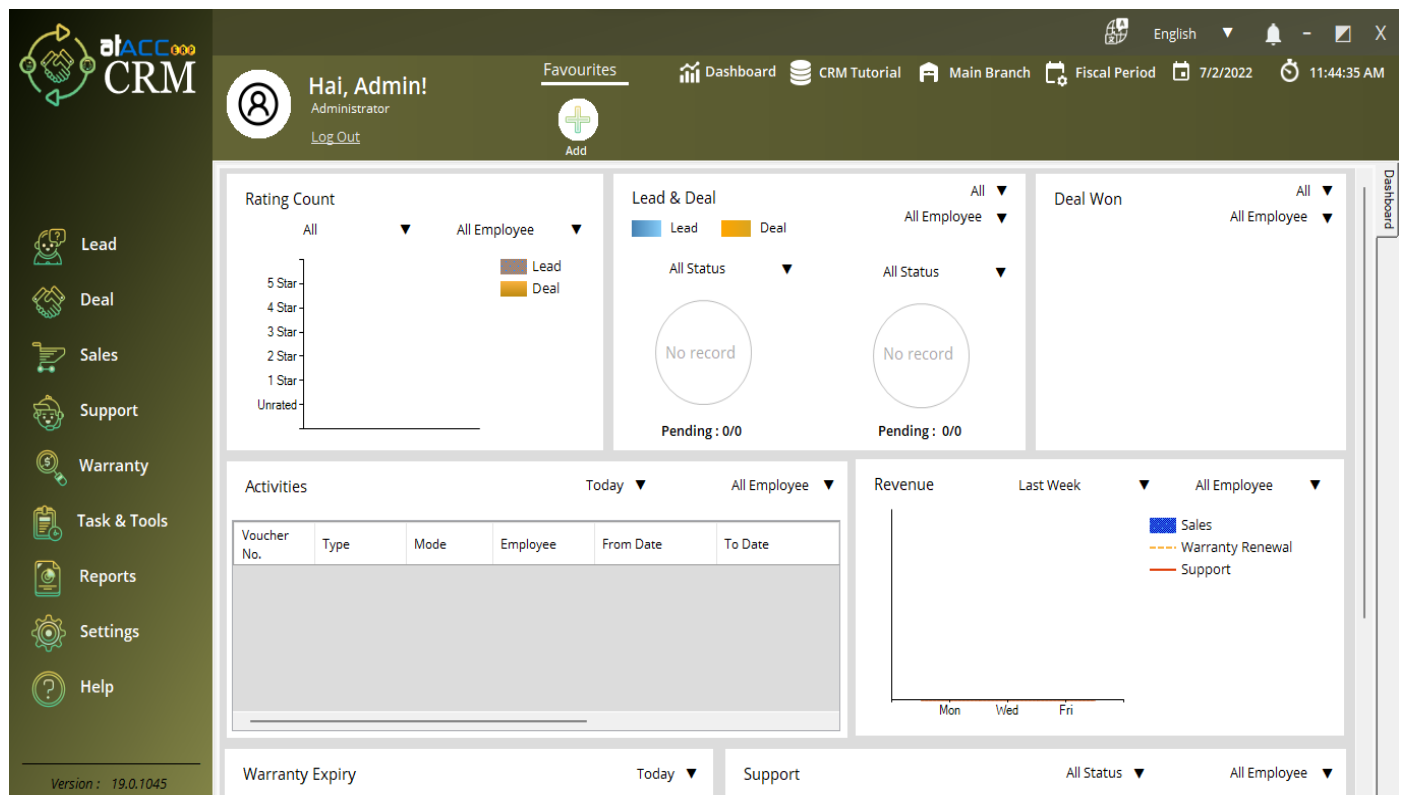


Customer Relationship Management

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

New Lead Voucher No: LD1 Voucher Date: 7/ 2/2022

* Name:

New Existing

* Customer: Mr.

Company:

Address 1:

Address 2:

Address 3:

City:

State:

Country: United Kingdom

Postal Code:

Telephone:

* Mobile: +44

Social Media Number: +44

Email:

Website:

* Lead Source: Advertisement

* Lead Mode: Telephone

Industry Type: None

Purpose of Lead: None

Referred By: None Agent Party

Agent:

Party:

* Status: Open

* Registered By:

Report To: [None]

Remarks:

Rating: ☆☆☆☆☆

+ New Save Edit Print Delete Search

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

Lead Email Submission Voucher No: LDES1 Voucher Date: 7/ 2/2022

* Lead Voucher :

Lead Name:

Customer:

Recipient:

Email ID:

CC:

BCC:

Subject:

Send By:

Content:

* Status: Sent

Note 1:

Note 2:

Attachments

Send Date: 7/ 2/2022

+ New Save Edit Delete Search

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 Voucher No: LDD1 Voucher Date: 6/30/2022

* Lead Voucher :

Lead Name:

Customer:

* Demo Mode: None

* Assigned By: Althaf(support)

* Assigned To: Althaf(support)

* Demo From: 6/30/2022 05:58 PM

* Demo To: 6/30/2022 05:58 PM

* Status: Open

Note 1:

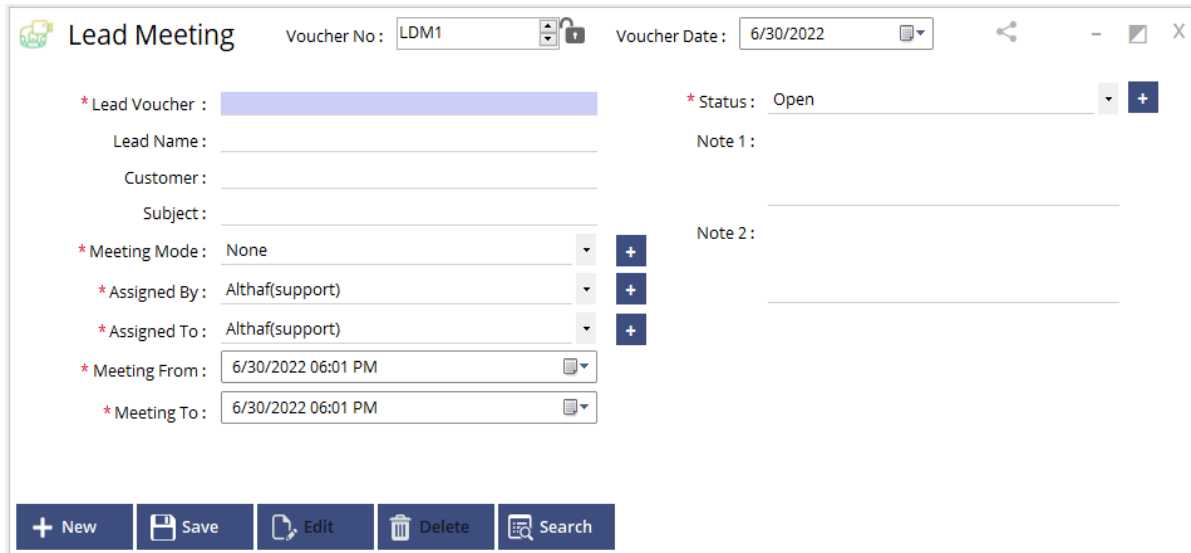
Note 2:

* Demo Count: 1

+ New Save Edit Delete Search

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.

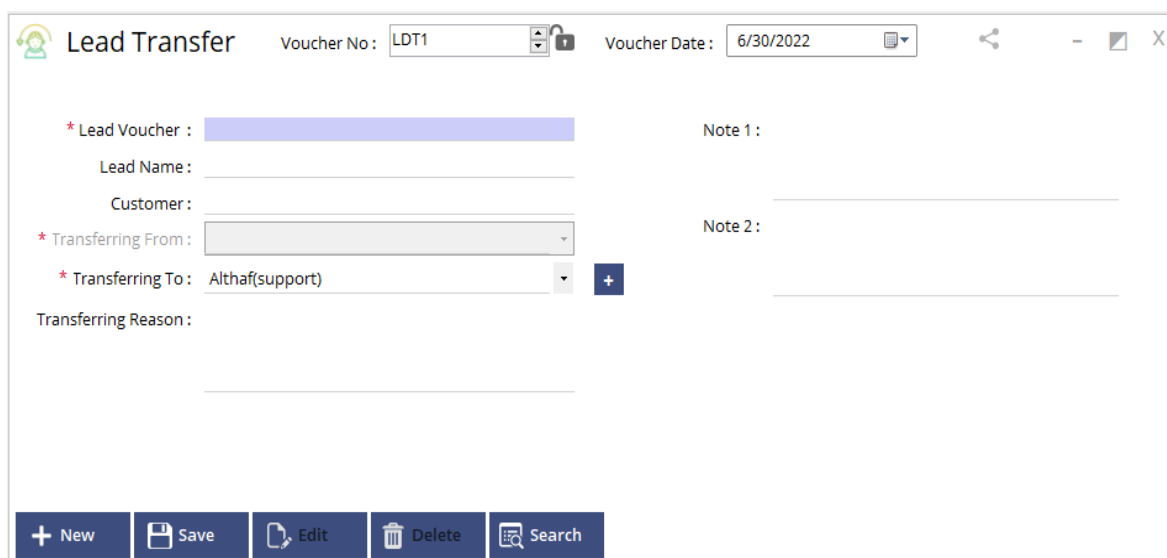
4. Lead Meeting



The screenshot shows the 'Lead Meeting' form. At the top, it displays 'Lead Meeting' with a logo, 'Voucher No: LDM1', and 'Voucher Date: 6/30/2022'. The form contains several fields: '* Lead Voucher' (highlighted in blue), 'Lead Name', 'Customer', 'Subject', '* Meeting Mode' (set to 'None'), '* Assigned By' (set to 'Althaf(support)'), '* Assigned To' (set to 'Althaf(support)'), '* Meeting From' (set to '6/30/2022 06:01 PM'), and '* Meeting To' (set to '6/30/2022 06:01 PM'). On the right side, there are '* Status' (set to 'Open'), 'Note 1', and 'Note 2'. At the bottom, there is a toolbar with buttons for '+ New', 'Save', 'Edit', 'Delete', and 'Search'.

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.

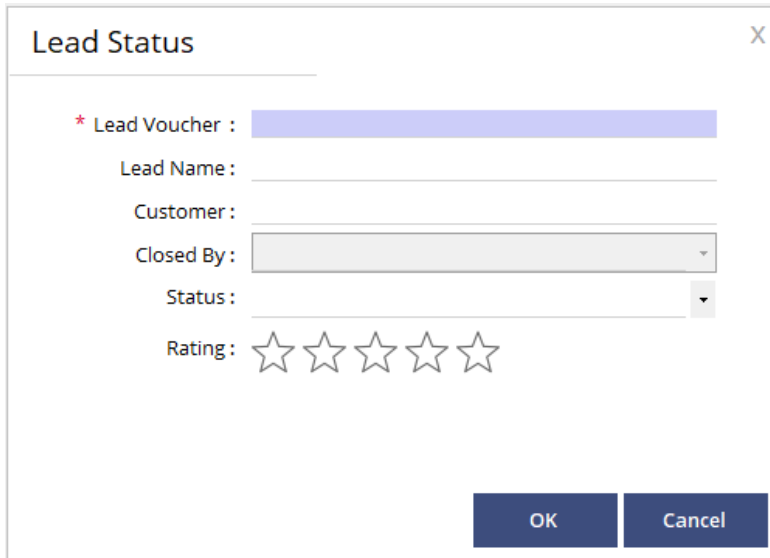
5. Lead Transfer



The screenshot shows the 'Lead Transfer' form. At the top, it displays 'Lead Transfer' with a logo, 'Voucher No: LDT1', and 'Voucher Date: 6/30/2022'. The form contains several fields: '* Lead Voucher' (highlighted in blue), 'Lead Name', 'Customer', '* Transferring From' (a dropdown menu), '* Transferring To' (set to 'Althaf(support)'), and 'Transferring Reason'. On the right side, there are 'Note 1' and 'Note 2'. At the bottom, there is a toolbar with buttons for '+ New', 'Save', 'Edit', 'Delete', and 'Search'.

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

6. Lead Status



Lead Status

* Lead Voucher :

Lead Name :

Customer :

Closed By :

Status :

Rating : ☆☆☆☆☆

OK Cancel

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

New Deal Voucher No: DL1 Voucher Date: 7/ 2/2022

Lead Voucher : _____

* Name : _____
 New Existing

* Customer: Mr. _____
Company : _____
Address 1 : _____
Address 2 : _____
Address 3 : _____
City & State : _____
Country: United Kingdom
Postal Code : _____
Telephone : _____
* Mobile: +44 _____
Social Media Number: +44 _____
Email : _____
Website : _____

Misc. Add Product / Service

* Deal Source: Advertisement
* Deal Mode: Telephone
Industry Type: None
Purpose of Deal: None
* Stage: _____
Referred By: None Agent Party
Agent: _____
Party: _____
* Status: Open
* Registered By: _____
Report To: [None]
Quoted Amount: _____
Discount: _____
Expected Revenue: _____
Deal Period: 7/ 2/2022
Rating: ☆☆☆☆☆

+ New Save Edit Print Delete Search

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

The screenshot shows a 'Deal Demo' form with the following fields and values:

- Voucher No: DLD1
- Voucher Date: 6/30/2022
- * Deal Voucher: (empty)
- Deal Name: (empty)
- Customer: (empty)
- * Demo Mode: None
- * Assigned By: Althaf(support)
- * Assigned To: Althaf(support)
- * Demo From: 6/30/2022 06:29 PM
- * Demo To: 6/30/2022 06:29 PM
- * Status: Open
- Note 1: (empty)
- Note 2: (empty)
- * Demo Count: 1

At the bottom, there is a toolbar with buttons for New, Save, Edit, Delete, and Search.

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

The screenshot shows a 'Deal Meeting' form with the following fields and values:

- Voucher No: DLM1
- Voucher Date: 6/30/2022
- * Deal Voucher: (empty)
- Deal Name: (empty)
- Customer: (empty)
- Subject: (empty)
- * Meeting Mode: None
- * Assigned By: Althaf(support)
- * Assigned To: Althaf(support)
- * Meeting From: 6/30/2022 06:33 PM
- * Meeting To: 6/30/2022 06:33 PM
- * Status: Open
- Note 1: (empty)
- Note 2: (empty)

At the bottom, there is a toolbar with buttons for New, Save, Edit, Delete, and Search.

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

The screenshot shows a 'Deal Transfer' form with the following fields and controls:

- Voucher No: DLT1
- Voucher Date: 6/30/2022
- * Deal Voucher: [Text Field]
- Deal Name: [Text Field]
- Customer: [Text Field]
- * Transferring From: [Dropdown Menu]
- * Transferring To: Althaf(support) [Dropdown Menu]
- Transferring Reason: [Text Field]
- Note 1: [Text Field]
- Note 2: [Text Field]
- Buttons: + New, Save, Edit, Delete, Search

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

5. Sales Estimation

The screenshot shows a 'Sales Estimation' form with the following fields and controls:

- Voucher No: DLSE1
- Voucher Date: 6/30/2022
- * Deal Voucher: [Text Field]
- Deal Name: [Text Field]
- Customer: [Text Field]
- Agent: [Dropdown Menu]
- Quoted Amount: [Text Field]
- Discount: [Text Field]
- Estimation: [Text Field]
- Comments: [Text Field]
- Table:

Sl.No	Name	Qty	ItemNote
*			
- Count of Estimation: 0.00
- Grand Total: 0.00
- Buttons: + New, Save, Edit, Print, Delete, Search

On this stage one can add product/service estimation.

6. Stage update

Stage Update Voucher No: DLSG1 Voucher Date: 6/30/2022

* Deal Voucher : _____

Deal Name : _____

Customer : _____

* From Stage : _____ +

* To Stage : Done Deal +

* Updated By : Althaf(support) +

Note 1 : _____

Note 2 : _____

+ New Save Edit Delete Search

On this stage one can transfer one stage to another.

7. Deal Status

Deal Status X

* Deal Voucher : _____

Deal Name : _____

Customer : _____

Closed By : _____

Status : _____





Rating : ☆☆☆☆

OK Cancel

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

Party Creation X

- Contact Details
- Shipping Details
- Transaction Details
- Deal Details
- Documents
- Contact Person
- Other Details

* Code: Deal Voucher:

* Name:

* Group:

* Account:

Status: Active Inactive

Company Name:

Contact Person:

Address 1:

Address 2:

Address 3:

City: State:

Country:

Postal Code: Telephone:

Social Media Mobile: Mobile:

Email:

Website:

+ New Save Edit Delete Search

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

9. Advance Payment

Advance Payment Voucher No: DLADV1 Voucher Date: 7/ 2/2022

* Deal Voucher : Deal Name : Customer : * Cashier : Comments :
* Party :

Mode	Account	Instrument Number	Card Type	Amount

+ New Save Edit Print Delete Search **Total : 0.00**

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

➤ Sales Invoice

Sales Invoice

Voucher No:

Voucher Date:

*** Deal Voucher :**

Deal Name:

Customer:

*** Party :** +

Agent:

Quoted Amount:

Discount:

Final Sales Estimation:

*** Salesman / Serviceman :** +

Sales Invoice:

Service Sales Invoice:

Comments:

Sl.No	Product / Service	Name	Qty	Item
*				

Sl.No	Product / Service	Name	WarrantyDate
*			7/2/2022

Sales

Advance

Service Sales

Payment

Net Total

Balance

Count of Invoice

Grand Total

+ New
Save
Edit
Print
Delete
Search
Payment

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

➤ Support

1. Support Entry

Support Entry Voucher No: SPE1 Voucher Date: 7/ 2/2022

* Party:
Company:
Mobile:
Email:
Reported Person:
* Type of Support: None
Complaint:
Product:
Remarks:
* Registered By:
Report To: [None]

* Support Mode: Telephone
* Stage:
* Status: Open
* Response: Will arrange a Demo
* Potential: Cold
Registered Date: 7/ 2/2022 10:59 AM
Expected Closing Date: 7/ 2/2022 10:59 AM

Check History
Misc.

Token Number

+ New Save Edit Print Delete Search

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. Support Transfer

The screenshot shows a 'Support Transfer' form with the following fields and controls:

- Voucher No.:** SPT1
- Voucher Date:** 7/ 2/2022
- * Support Voucher:** [Text input field]
- Party:** [Text input field]
- Token Number:** [Text input field]
- * Transferring From:** [Dropdown menu]
- * Transferring To:** [Dropdown menu] with a '+' button
- Transferring Reason:** [Text input field]
- Note 1:** [Text input field]
- Note 2:** [Text input field]
- Bottom Toolbar:** + New, Save, Edit, Delete, Search

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


3. Stage update

The screenshot shows a 'Stage Update' form with the following fields and controls:

- Voucher No.:** SPSPG1
- Voucher Date:** 7/ 2/2022
- * Support Voucher:** [Text input field]
- Party:** [Text input field]
- Token Number:** [Text input field]
- * From Stage:** [Dropdown menu] with a '+' button
- * To Stage:** [Dropdown menu] with a '+' button
- * Updated By:** [Dropdown menu] with a '+' button
- Note 1:** [Text input field]
- Note 2:** [Text input field]
- Bottom Toolbar:** + New, Save, Edit, Delete, Search

Here we can update stages for support flow.

4. Support Payment

 **Support Payment** Voucher No: Voucher Date:

* Support Voucher : * Cashier :

Party: Comments :

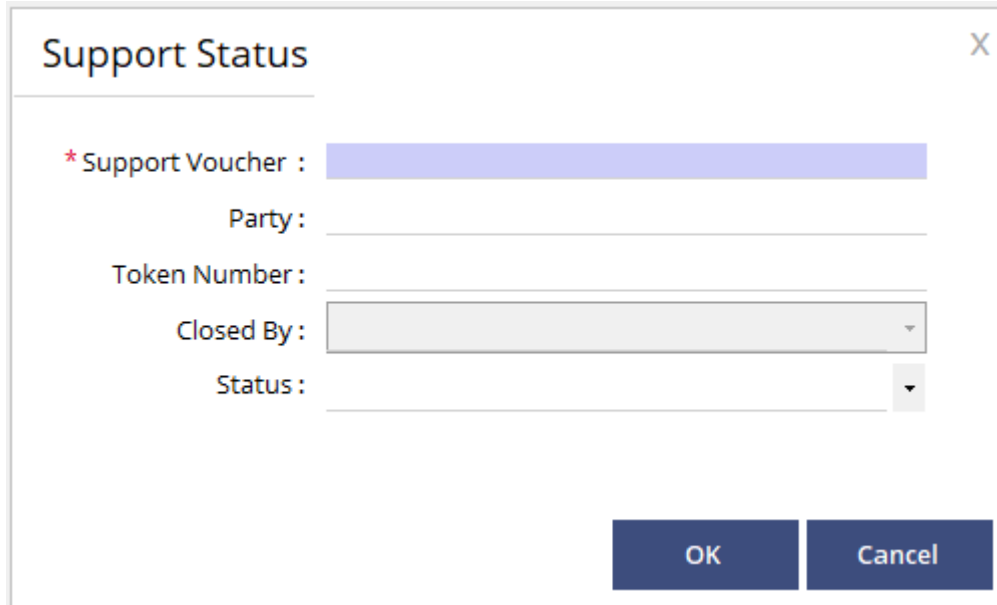
Token Number:

	Mode	Account	Instrument Number	Card Type	Amount
*					

Total :

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

5. Support Status



The image shows a dialog box titled "Support Status" with a close button (X) in the top right corner. The dialog contains the following fields:

- * Support Voucher :
- Party :
- Token Number :
- Closed By :
- Status :

At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

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

➤ Warranty

1. Opening warranty

Opening Warranty Voucher No: OW1 Voucher Date: 7/ 2/2022

Remarks:

Sl.No	Party	Product / Service	Name	ItemNote	Start Date	End Date
*					7/2/2022	7/2/2022

+ New Save Edit Delete Search

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

2. Warranty Renewal

Warranty Renewal Voucher No: WR1 Voucher Date: 7/ 2/2022

* Party: Remarks:

Renewed By: +

Sl.No	Product / Service	Name	ItemNote	Start Date	End Date
*				7/2/2022	7/2/2022

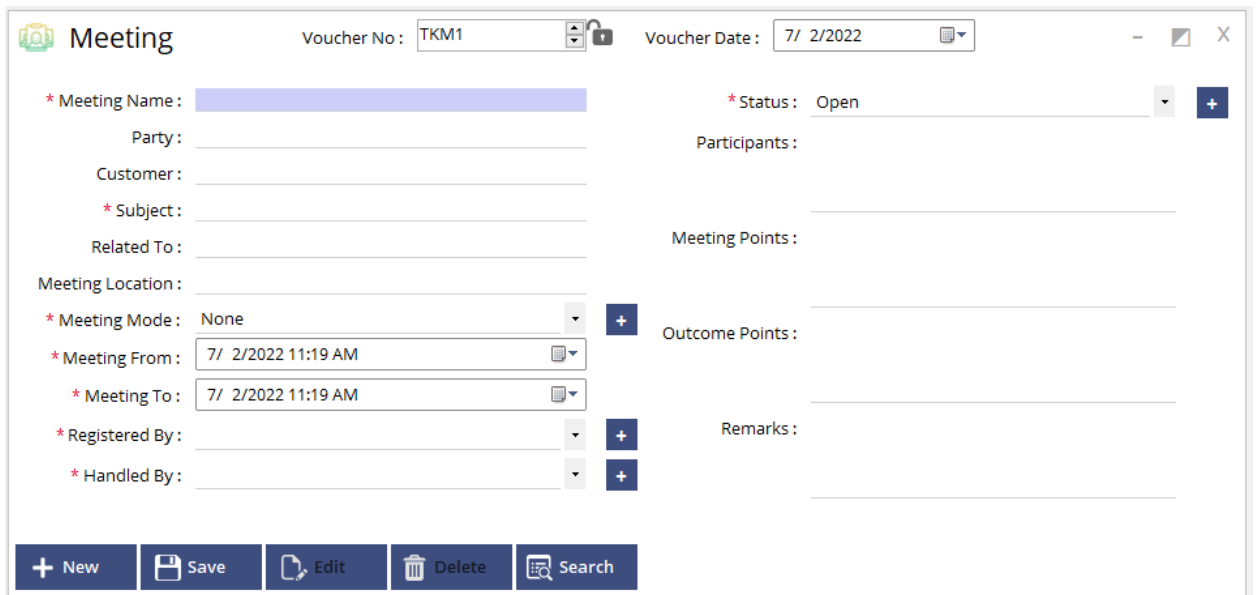
Payment

+ New Save Edit Print Delete Search Payment

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

➤ Task and tools

1. Meeting



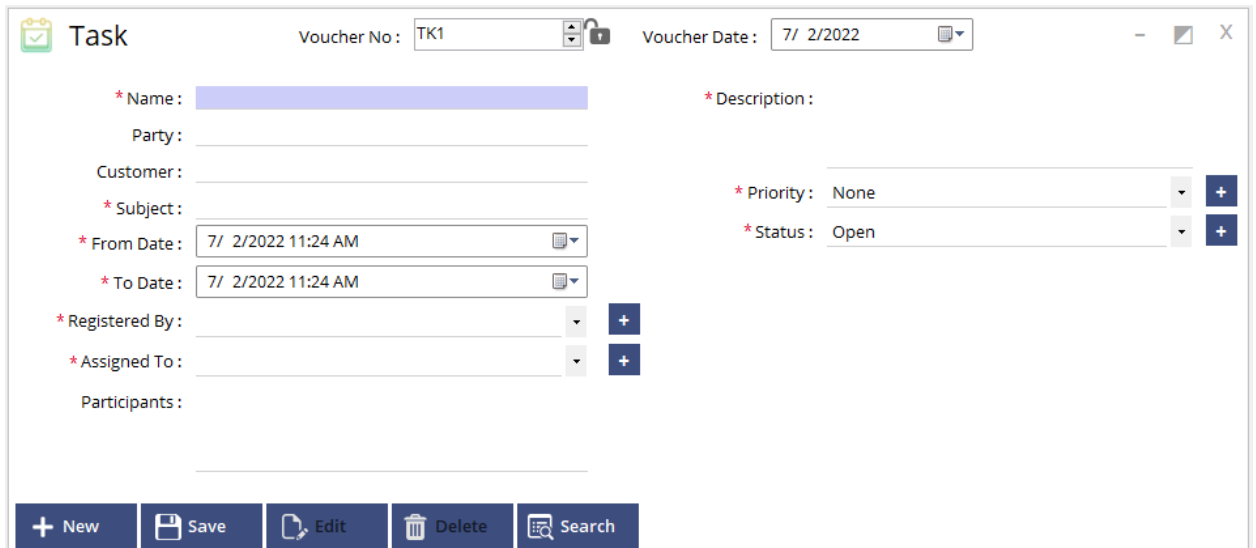
The screenshot shows a 'Meeting' form with the following fields and controls:

- Voucher No:** TKM1
- Voucher Date:** 7/ 2/2022
- * Meeting Name:** (text input)
- * Status:** Open (dropdown menu)
- Party:** (text input)
- Participants:** (text input)
- Customer:** (text input)
- * Subject:** (text input)
- Meeting Points:** (text input)
- Related To:** (text input)
- Meeting Location:** (text input)
- * Meeting Mode:** None (dropdown menu)
- * Meeting From:** 7/ 2/2022 11:19 AM (datetime picker)
- * Meeting To:** 7/ 2/2022 11:19 AM (datetime picker)
- * Outcome Points:** (text input)
- * Registered By:** (dropdown menu)
- * Handled By:** (dropdown menu)
- Remarks:** (text input)

At the bottom, there is a toolbar with buttons: + New, Save, Edit, Delete, and Search.

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

2. Task



The screenshot shows a 'Task' form with the following fields and controls:

- Voucher No:** TK1
- Voucher Date:** 7/ 2/2022
- * Name:** (text input)
- * Description:** (text input)
- Party:** (text input)
- * Priority:** None (dropdown menu)
- Customer:** (text input)
- * Status:** Open (dropdown menu)
- * Subject:** (text input)
- * From Date:** 7/ 2/2022 11:24 AM (datetime picker)
- * To Date:** 7/ 2/2022 11:24 AM (datetime picker)
- * Registered By:** (dropdown menu)
- * Assigned To:** (dropdown menu)
- Participants:** (text input)

At the bottom, there is a toolbar with buttons: + New, Save, Edit, Delete, and Search.

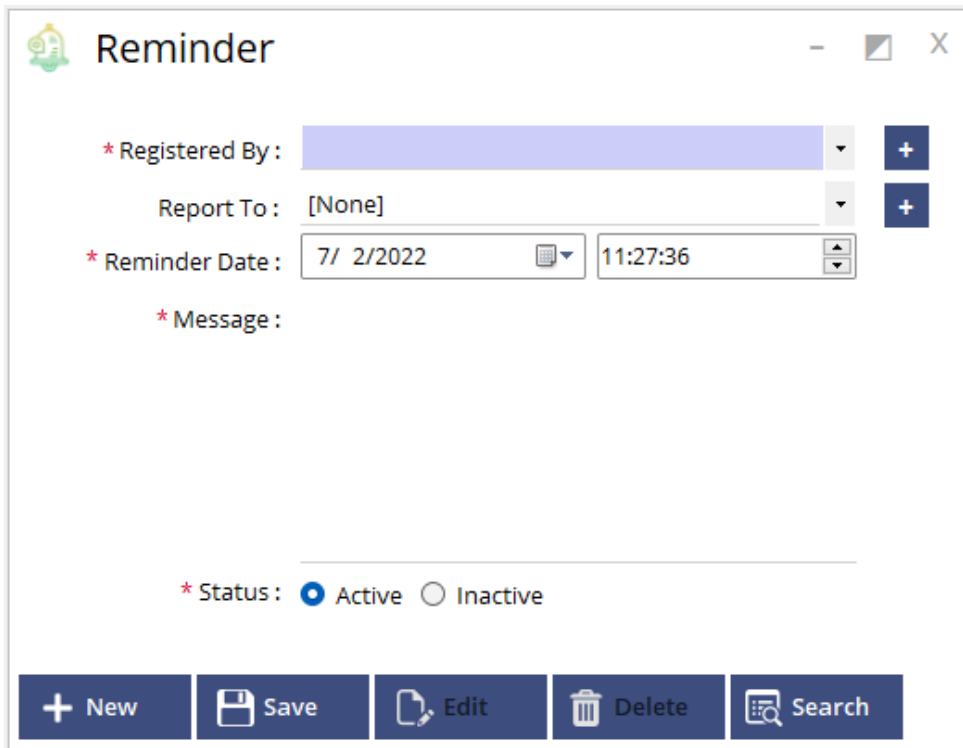
Here we can schedule tasks for customer.

3. Product Changes

The screenshot shows a software window titled "Product Changes". At the top, there are two input fields: "Voucher No:" with the value "TKPC1" and "Voucher Date:" with the value "7/ 2/2022". Below these, the form is organized into two columns. The left column contains: "Party:" (a highlighted text box), "Customer:" (a text box), "* Product:" (a text box), "* Change Type:" (a dropdown menu showing "None" and a "+" button), "Quoted Amount:" (a text box), "Change:" (a text box), "* Registered By:" (a dropdown menu with a "+" button), and "* Assigned To:" (a dropdown menu with a "+" button). The right column contains: "Required Period:" (two text boxes for "(Days)" and "(Hour)"), "* Status:" (a dropdown menu showing "Open" and a "+" button), "Started Date:" (a date picker showing "7/ 2/2022"), and "Closing Date:" (a text box). At the bottom of the window is a dark blue toolbar with five buttons: "+ New", "Save", "Edit", "Delete", and "Search".

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



The screenshot shows a 'Reminder' form with the following fields and controls:

- Registered By:** A dropdown menu with a blue '+' button to its right.
- Report To:** A dropdown menu with '[None]' selected and a blue '+' button to its right.
- Reminder Date:** Two input fields: the first contains '7/ 2/2022' with a calendar icon, and the second contains '11:27:36' with a time selection icon.
- Message:** A large text area for entering the reminder message.
- Status:** Radio buttons for 'Active' (selected) and 'Inactive'.
- Toolbar:** A row of five buttons: '+ New', 'Save', 'Edit', 'Delete', and 'Search'.

Here we can set a reminder for general purpose. It will notify on the reminder icon on dashboard.

5. Import

Import X

Source File: -- Browse

Party Opening Warranty Get Fields

Destination	Source

[Delete Imported Party](#) Start Close

We can import opening warranty as a whole.

6. Invoice designer

The screenshot shows the 'Invoice Designer' application window. At the top left, the title is 'Invoice Designer' with a close button 'X' at the top right. Below the title, there is a 'Modules:' dropdown menu currently set to 'Customer Relationship Management'. A list of transaction types is displayed below the dropdown, with 'CRM Advance Payment' highlighted in blue. The other items in the list are 'CRM New Deal', 'CRM New Lead', 'CRM Sales Estimation', 'CRM Sales Invoice', 'CRM Support Entry', and 'CRM Support Payment'. To the right of the list are four dark blue buttons: 'Create New', 'Set Format', 'Open', and 'Exit'. Below these buttons are three dropdown menus: 'Printer' (set to 'ZDesigner ZD410-203dpi ZPL'), 'Report Type' (set to 'RDLC'), and 'Format' (set to 'Format 1'). At the bottom left, there is a 'Path:' label. At the bottom right, there are two dark blue buttons: 'Remove' and 'Apply Selected'.

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

User wise Settings

Login User : admin

- Print PreView
- Show Print dialogue box
- Print while saving in Lead
- Print while saving in Deal
- Print while saving in Sales
- Print while saving in Support
- Print while saving in Warranty
- Print while saving in Lead Activity
- Print while saving in Deal Activity
- Print while saving in Support Activity
- Send Email while saving in Lead
- Send Email while saving in Deal
- Send Email while saving in Sales
- Send Email while saving in Support
- Send Email while saving in Warranty

OK Canel

Can set user wise setting from the available list.

2. Message Template

The screenshot shows a dialog box titled "Message Template" with a standard Windows window control bar (minimize, maximize, close). The dialog is split into two main sections: "Email Template" on the left and "SMS Template" on the right. The "Email Template" section is currently selected and highlighted with a blue bar. Below this, there is a horizontal tab bar with the following tabs: "Lead", "Deal", "Deal", "Sales", "Support", and "Warranty". The "Lead" tab is active, and it contains four text input fields labeled "Lead", "Lead Demo", "Lead Meeting", and "Lead Transfer". To the right of these fields is a vertical panel labeled "Use Keys" which is currently empty. At the bottom right of the dialog, there are two buttons: "OK" with a checkmark icon and "Cancel" with an 'X' icon.

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

3. Default settings

Default Settings

Payment Accounts

Cash : Cash Account

Credit / Debit Card :

Cheque :

DD :

Online Banking :

EWallet :

General

Card Type : American Express

Warranty Period : 1 Year

Token Number : 1 Reset After (Days) : 1

OK Cancel

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