Customer Relationship Management (CRM)

FinAcct CRM provides detailed view of every customer and department to help maximize the interaction. Customer profiles and sales productivity tools help user identify opportunities and be proactive. It also helps to drive forecasting and make decisions with team and management.

FinAcct CRM delivers back office integration with ERP systems and provide solutions that delivers scalable framework which allows organization to experience single and unified platform. This has features like Sales Lead Management, Customer Profiles management, converting leads into opportunities and final sales deal. Sales deal eventually integrates with ERP via sales order management.

CRM Marketing, Sales and Service

This helps company to run Campaign through Email, Website and Social Platform. This also helps channel partner to publish the marketing stuff from vendor to end customer.

CRM Dashboard:

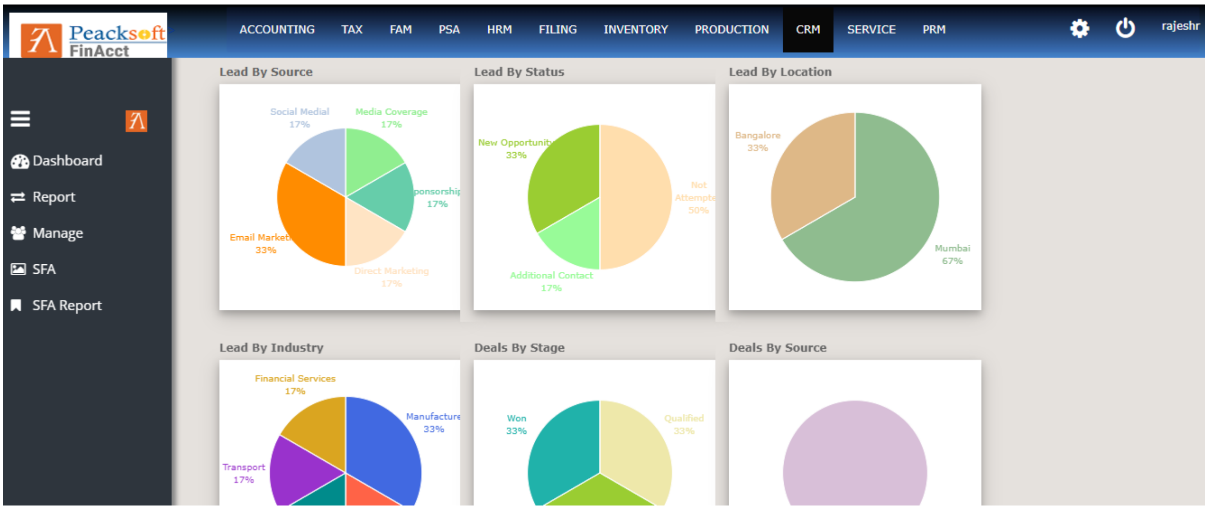


Fig. 1. Leads and Deals Statistics

CRM Dashboard shows the basic statistics like Leads percentage by source, status, location, industry and Deals by Stage and other activity by month.

a. Campaign management – Running Campaign, tracking activity, generating lead from it and tracking response in it helps company analyse the sales and marketing potential of any product and costs incurred in it.

The following figure shows the details of new campaign creation.

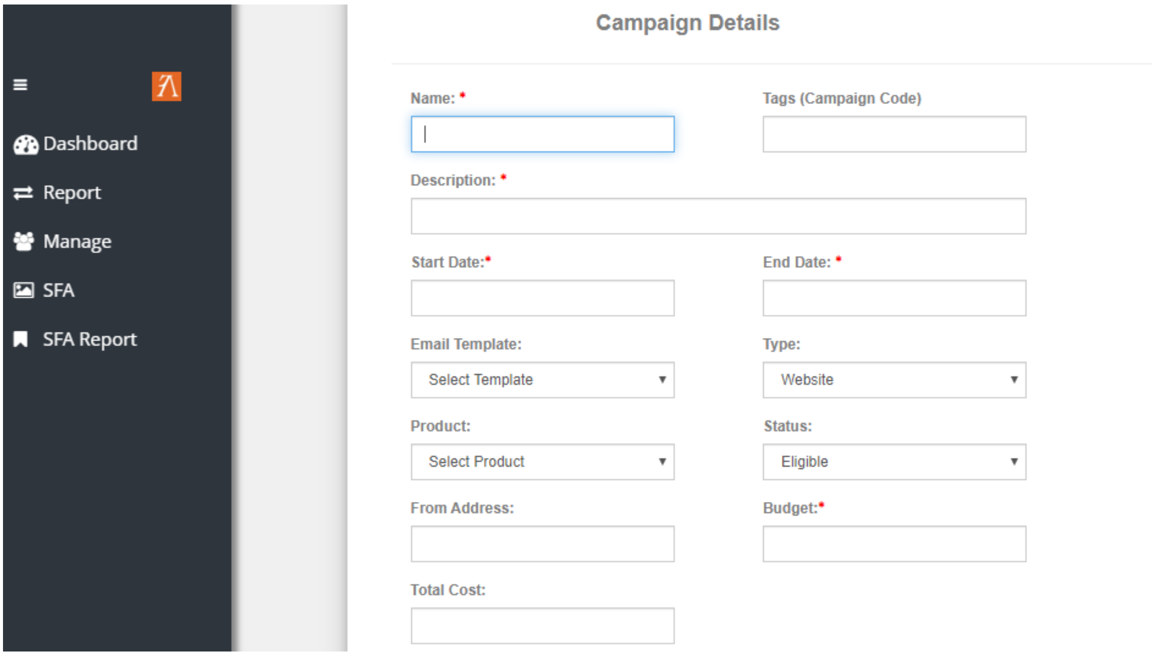
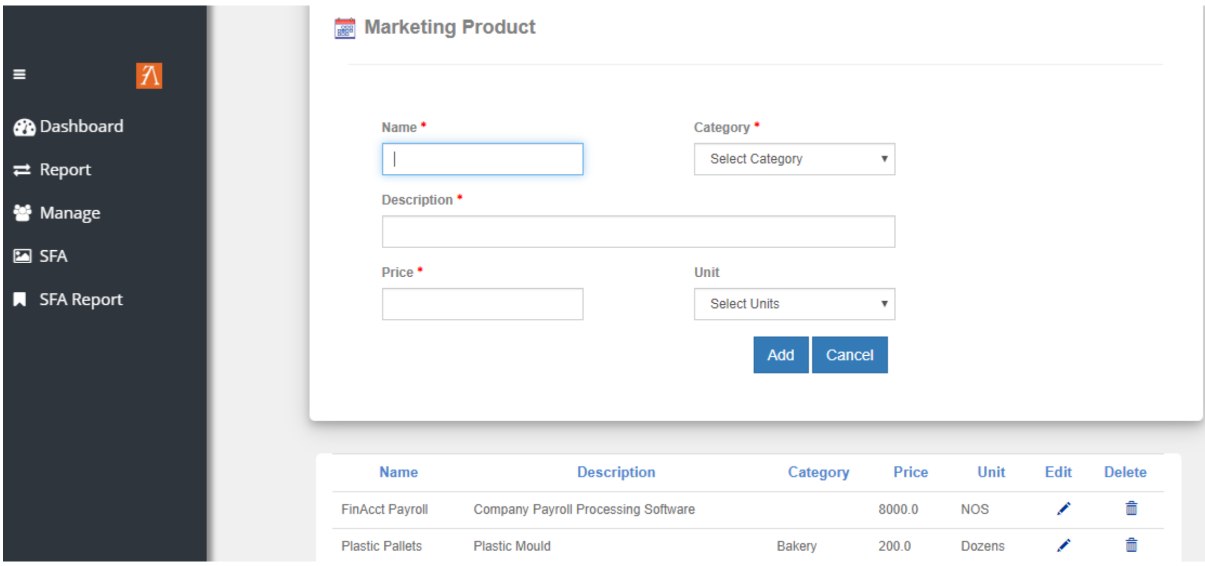


Fig2. New Campaign Creation

Before creating new campaign, user needs to create marketing product using the following product creation form.



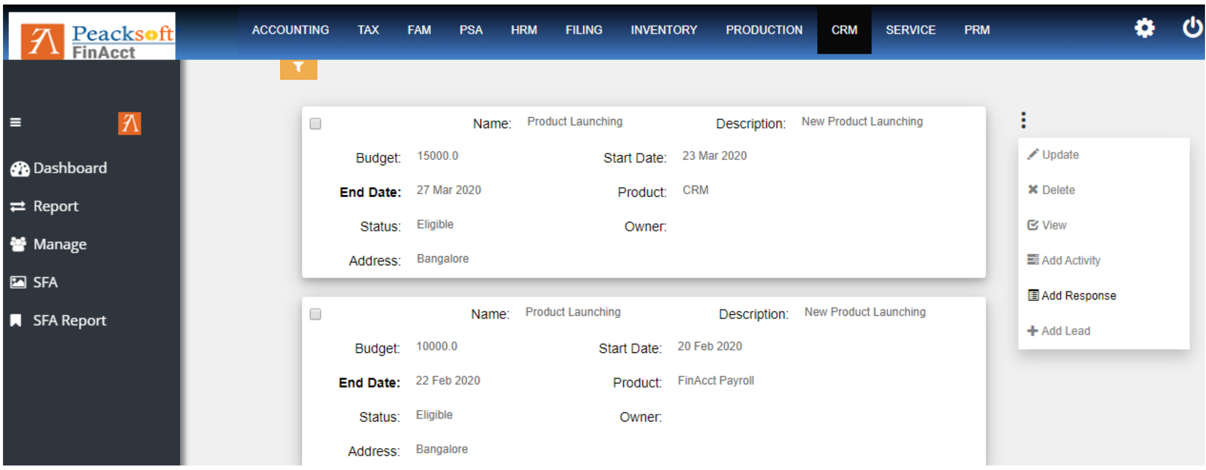


Fig3. Campaign Management

All the campaigns are managed by view/update/delete operation. From the list of campaign records, the user can add activity, add campaign response for a selected campaign record. All the leads can be added for a given campaign from **Add Lead** action button shown in the Fig3. The campaign response operation is captured in the following popup box from **Add Response** action.

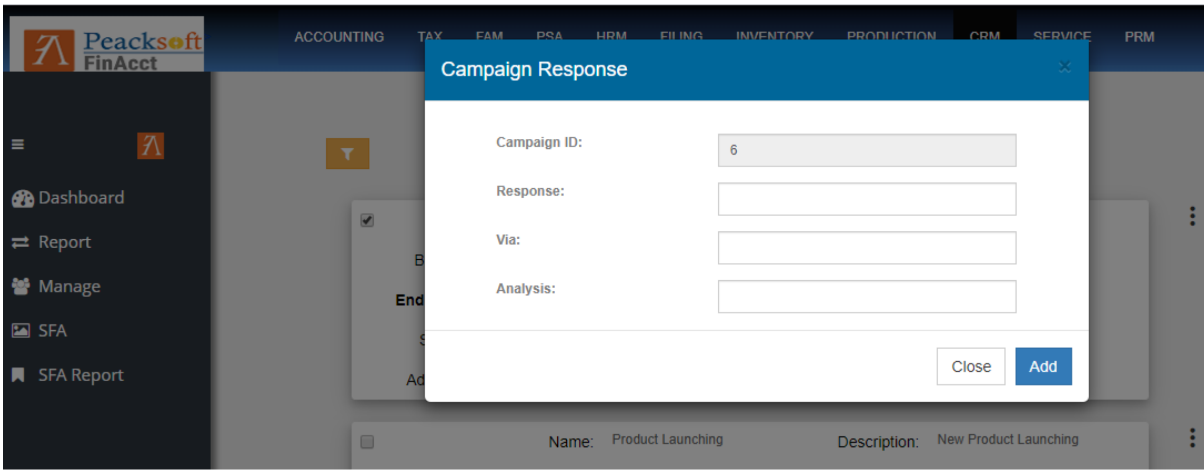


Fig4. Campaign Response capture

Similarly all campaign activities can be added by the following the operation. **Add Activity** action opens the following form.

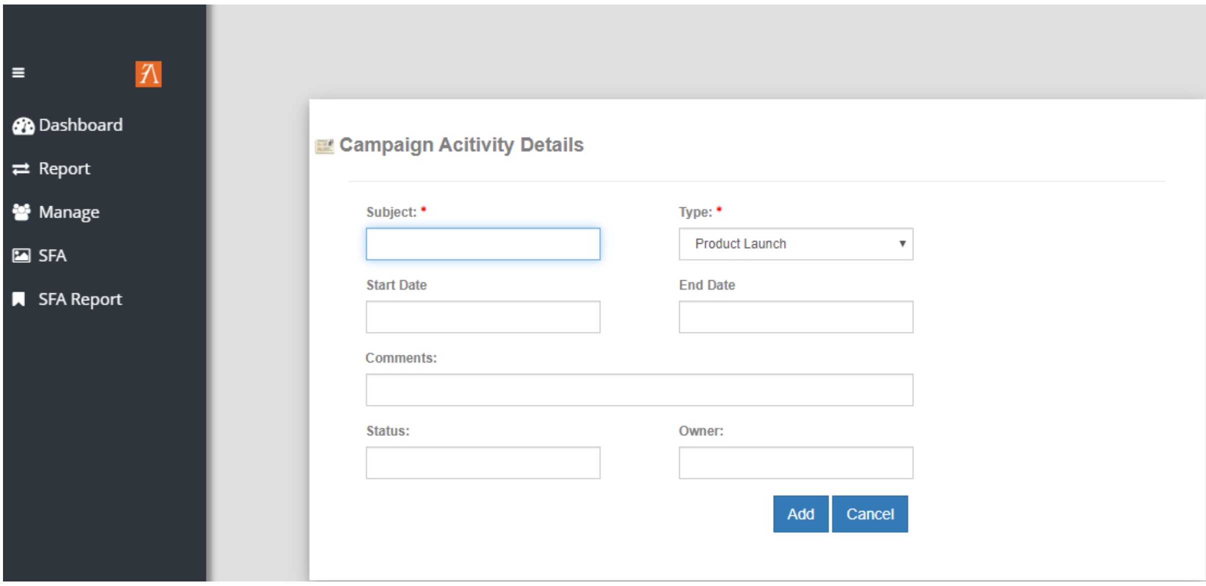


Fig5. Campaign Activity Creation

b. Marketing List and Member: To create targeted campaign, marketing list can be created and contact member be added to it

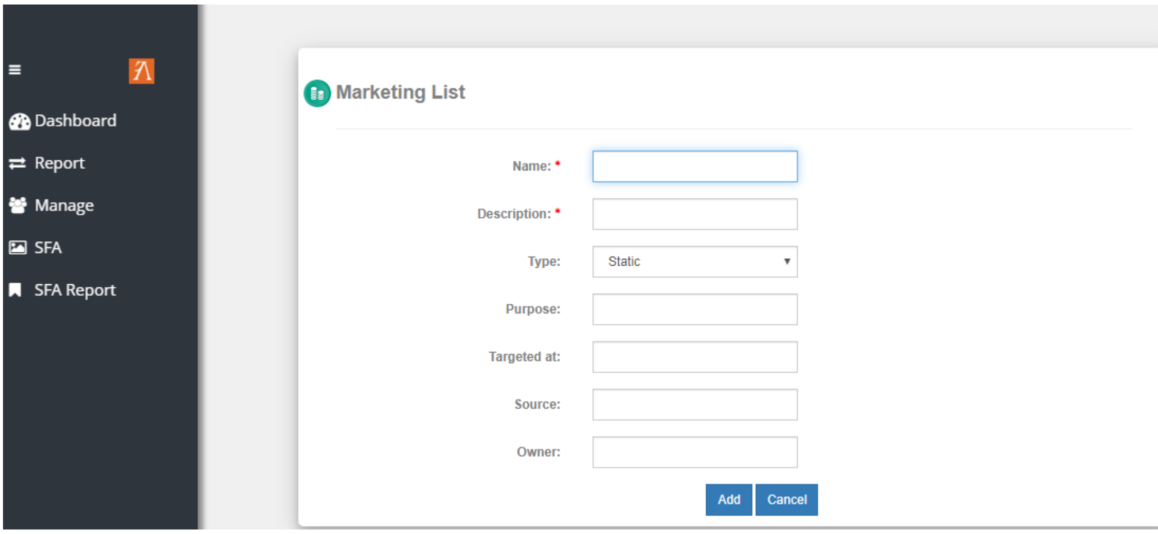
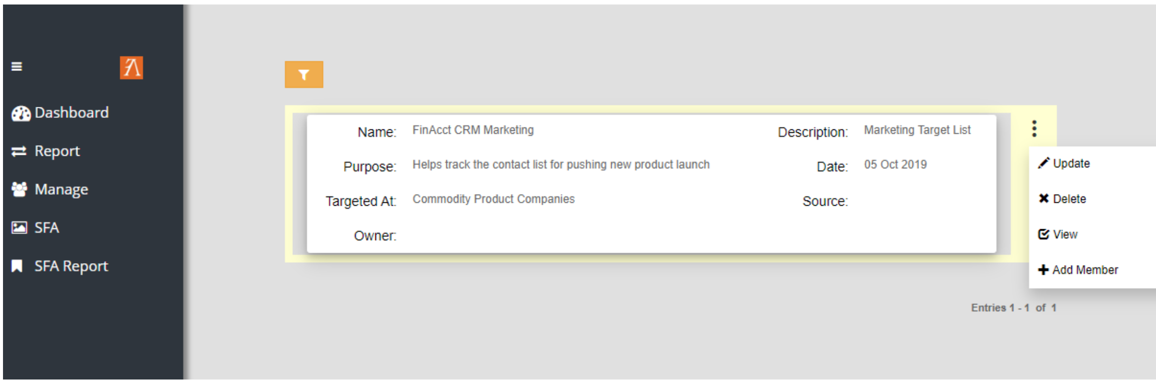
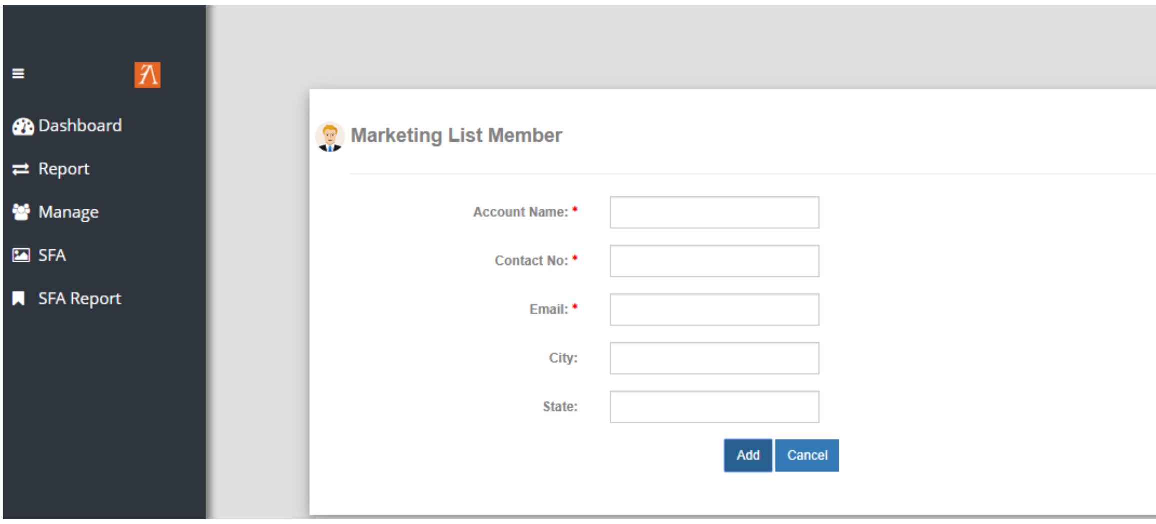


Fig6. Marketing List Creation



Marketing List Management

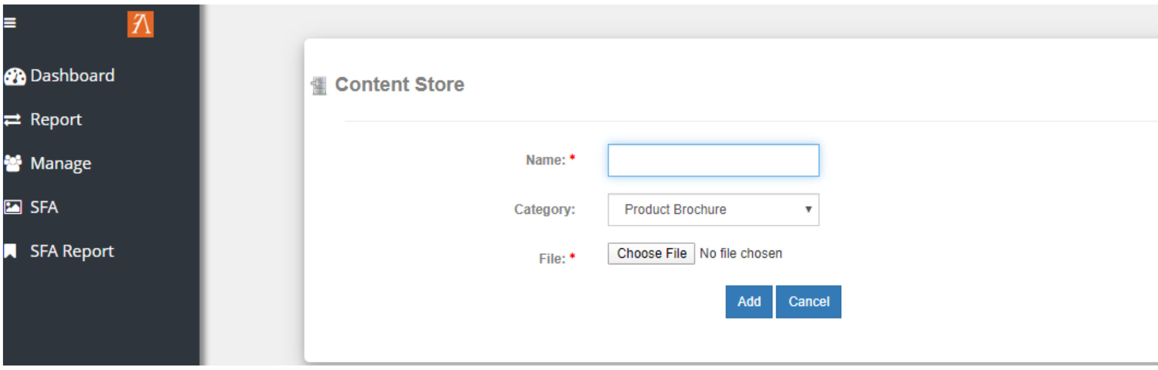
Add Member action for a given marketing list creates List Member as shown below



These marketing list members can be chosen for email activity target in any campaign.

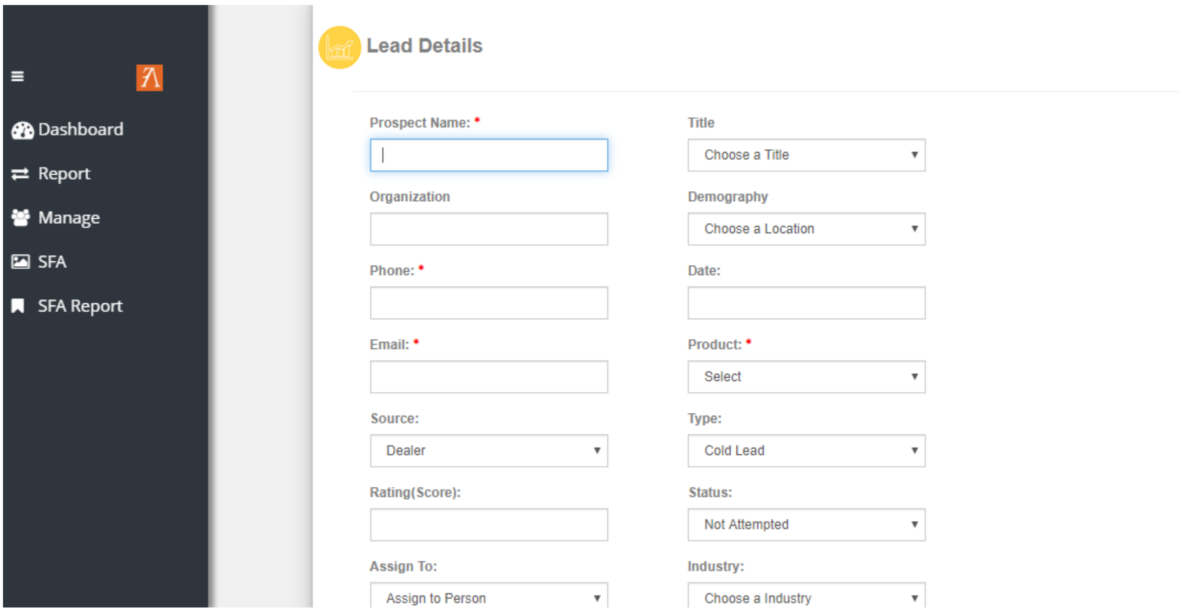
c. Marketing content publish via social media and other channels – Publishing product catalogue, brochure in social media and other online advertising portal helps product marketing bring better sales potential.

User can add and upload any digital content in this regard and share with other users.

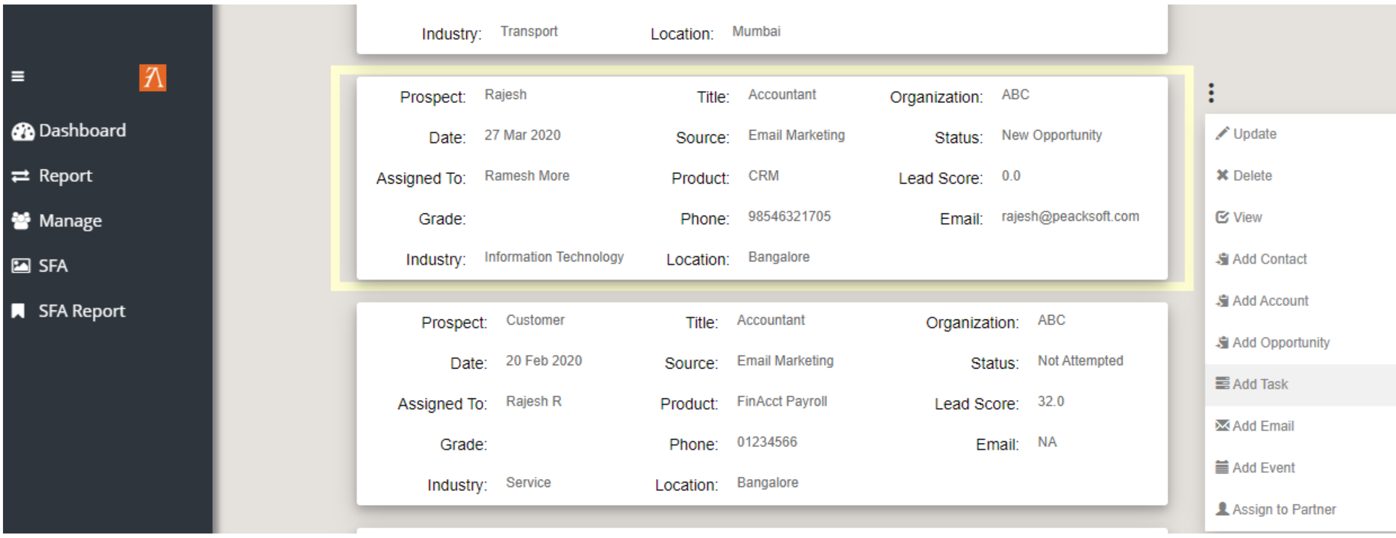


d. Lead Management – Once lead is added in CRM, all activity via email, event can be tracked in FinAcct. Lead statistics for open/close deals can be generated in lead dashboard.

User needs to add the prospects details with their demography, industry, source of lead in lead creation form.

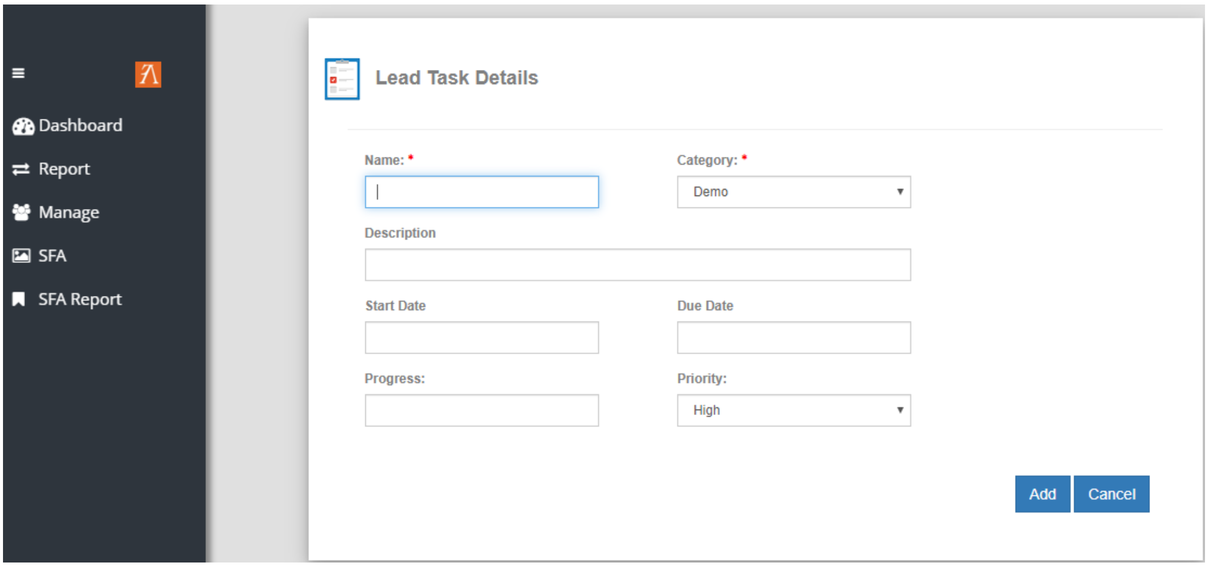


The leads added can be managed from list of leads record as shown below



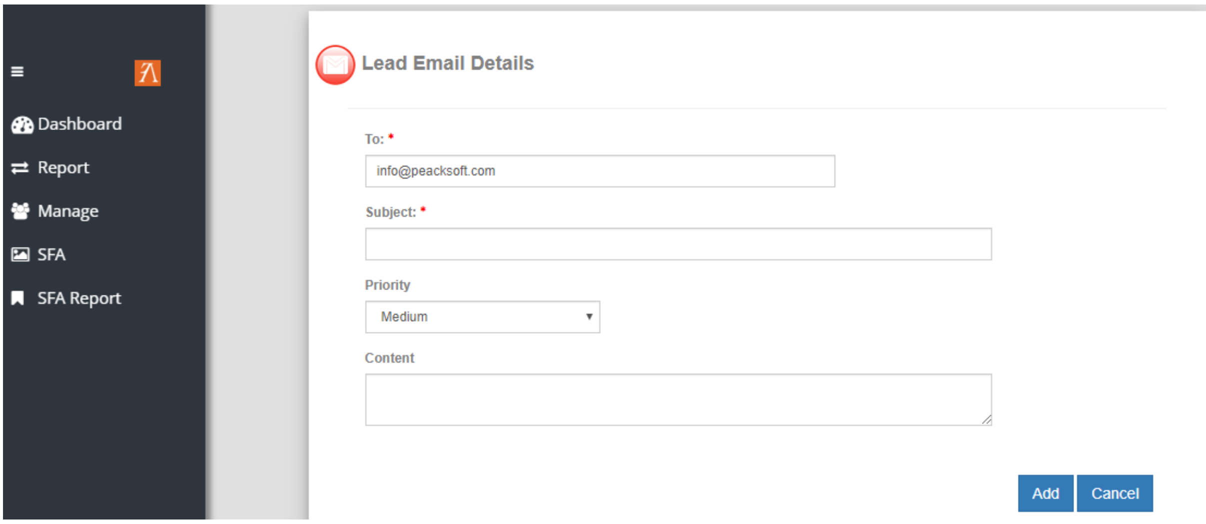
There are several actions for a given sales lead. User can add many activities like Task, Email, event for tracking the lead progress towards Opportunity.

Lead Task creation form is shown below (from **Add Task** action).

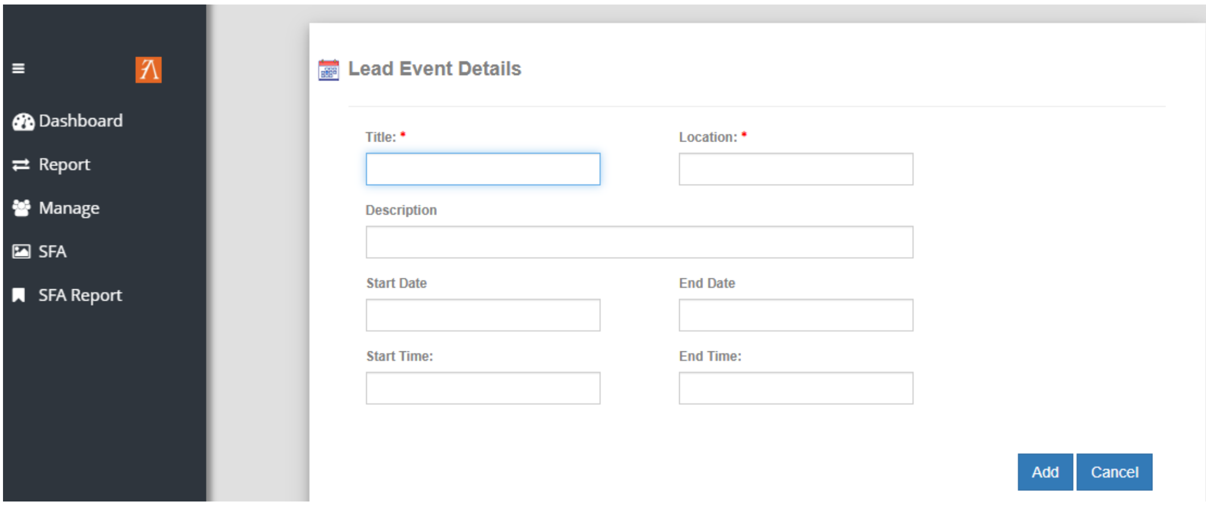


Every task has categories like demo, email, follow up, implementation, meeting. User Needs to provide start and end date for the task to be followed.

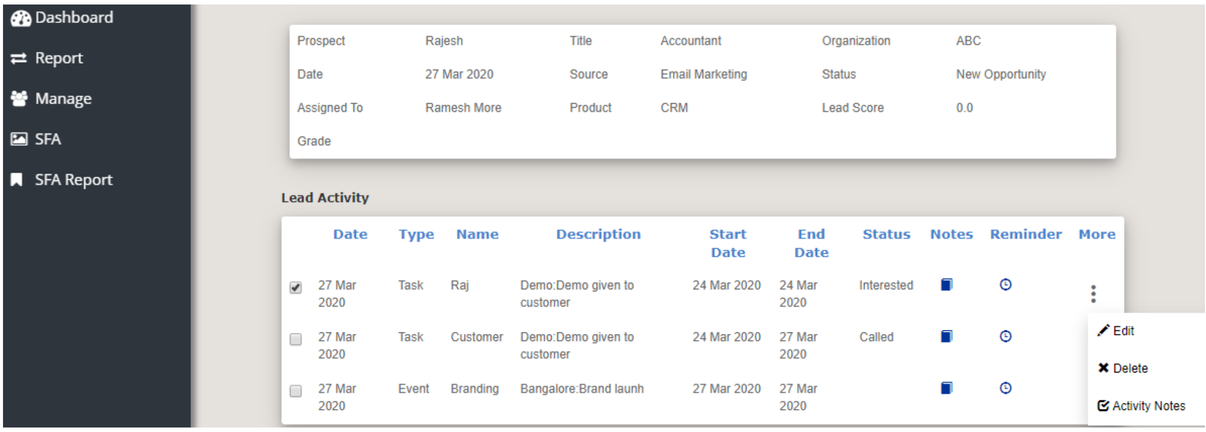
Lead email activity (from **Add Email** action) keeps record of email sent to the concerned prospects as shown below



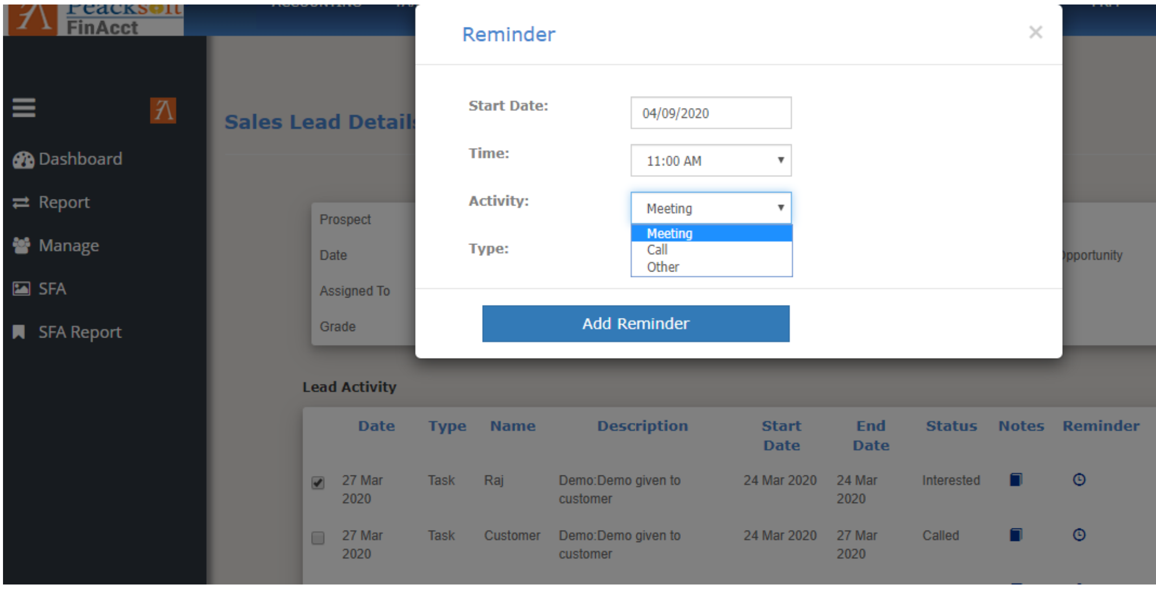
Similarly, add lead event (from **Add Event** action) for promotion of products and services captures the details of event that helps better lead conversion.



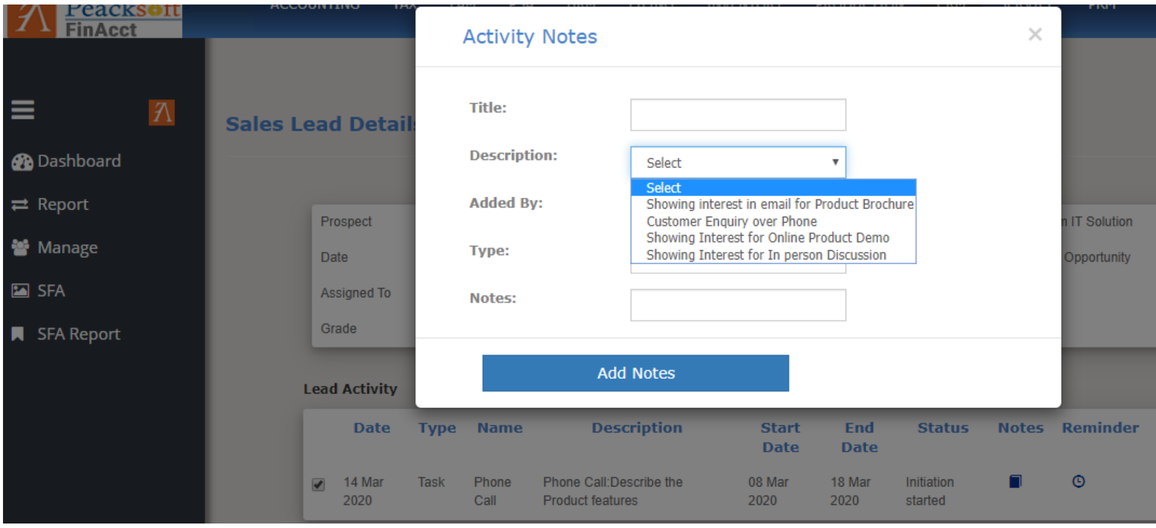
User can set reminder to any lead task for a given date and time and get notification sent via email. User can add as many notes against any lead activity from lead details report as shown below.



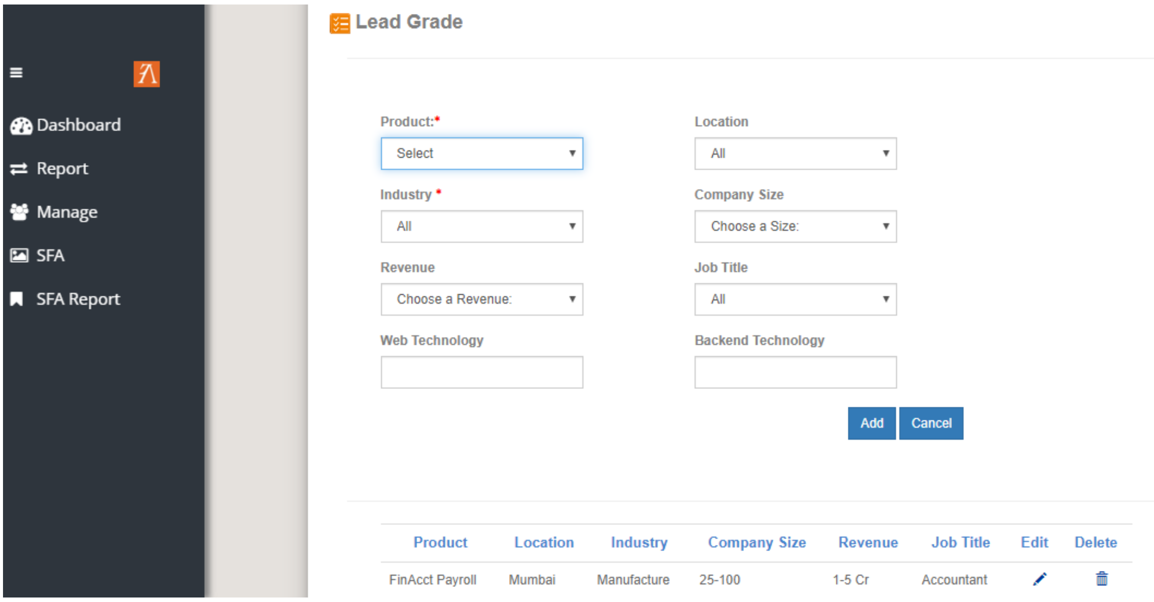
User needs to select any lead activity and click on Reminder button to set the reminder to any given date and time. The owner of the task will get email notification on the date set in the reminder.



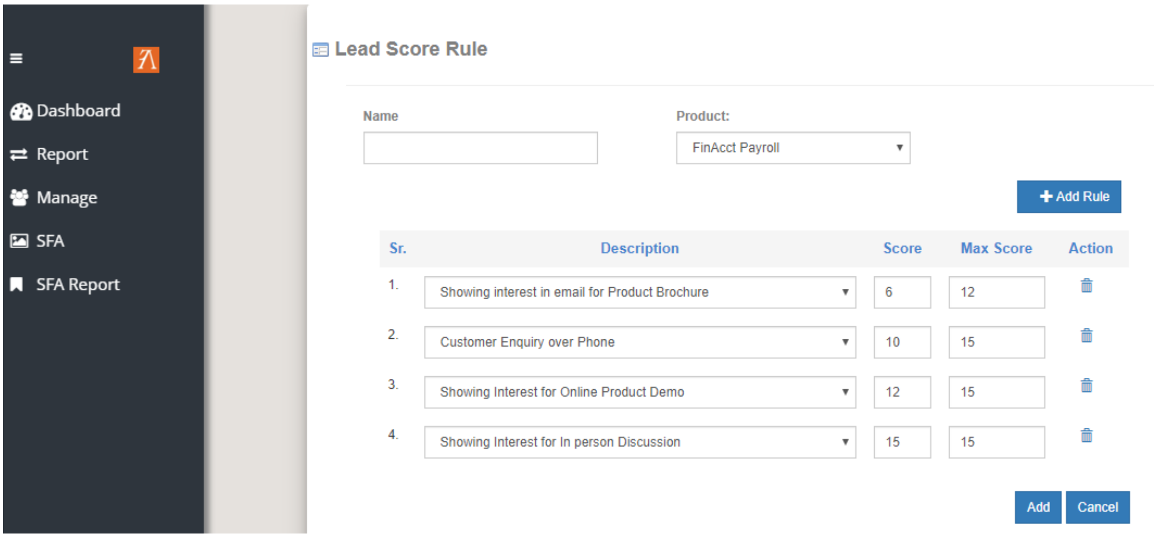
To add activity notes, user can select activity and click on Notes button to get activity Notes popup window.



Lead Grade and Lead score rule – Lead grade for any product is computed against few preferred settings of lead attributes. If the lead attributes match with this configured values, Lead grade value goes up and provides higher probability of deal conversion.

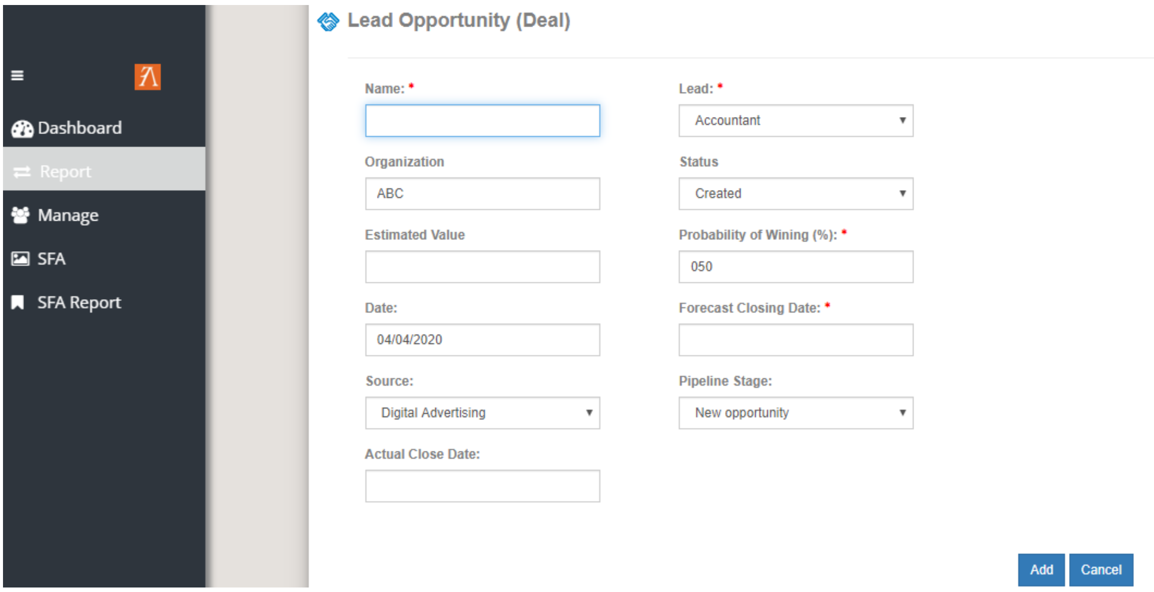


Lead score rule gives user the option to set weightage (score) to all the possible activities of lead. Based on the follow-up activities of lead, lead score is calculated. The higher the value of lead score, greater is the chance of deal conversion.



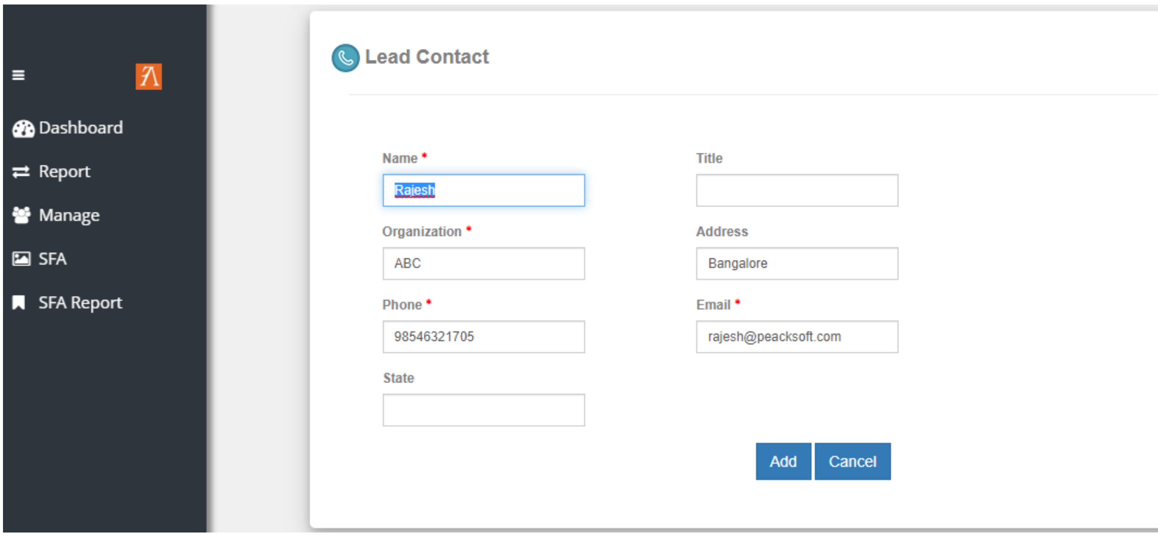
e. **Opportunities, Contact and Account Management** – Once leads are converted into opportunities, further activity tracking can lead to closure of final deal. Sales Quotation can be sent to probable lead contact. Once leads gets closed, corresponding Account and Contact for the given customer can be managed for after sales service and support.

Once any lead is qualified to be rendered as an opportunity, user can create Lead opportunity from it. **Add opportunity** action from Sales Lead record creates Sales Lead Opportunity as shown below.

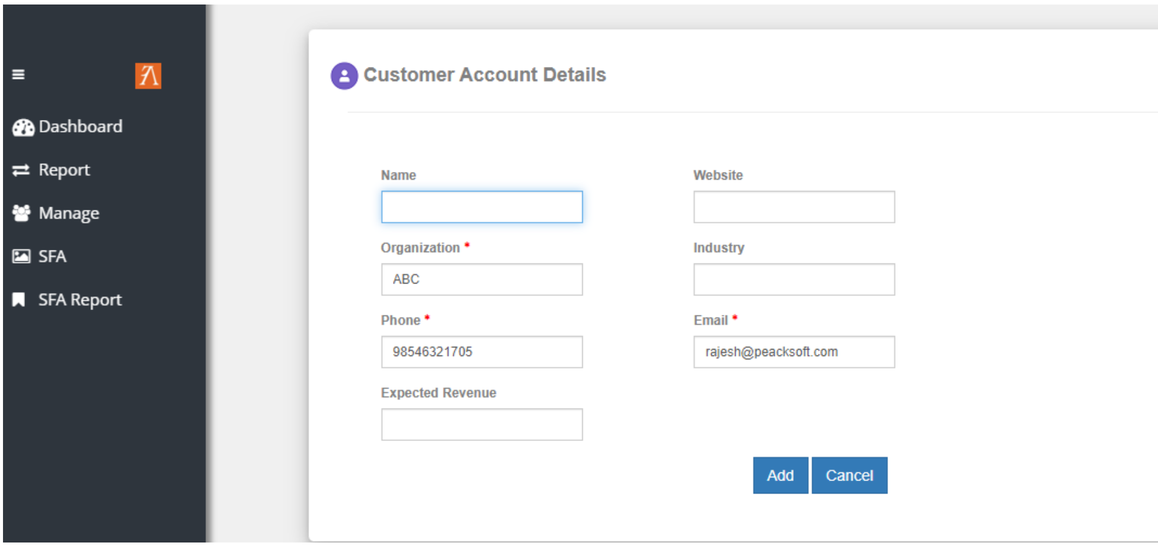


Deals value, probability of winning the deal, forecast date of closing the deal needs to be added in the above record. The tracking of lead opportunity is done via deal pipeline stages such as Contacting, Engaging, Qualified, in person meeting, Closing, Won, Lost.

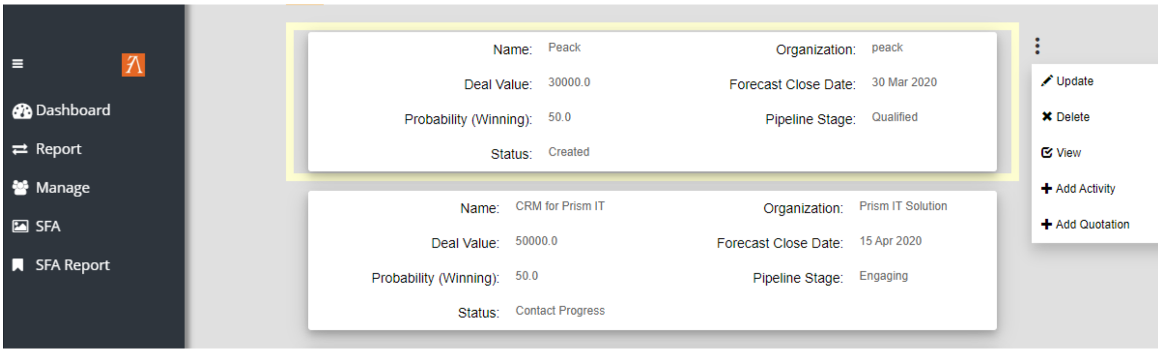
Similarly, once the lead is in probable deal stage, Contact and Account records are created so that they are managed by CRM tracking tools better.



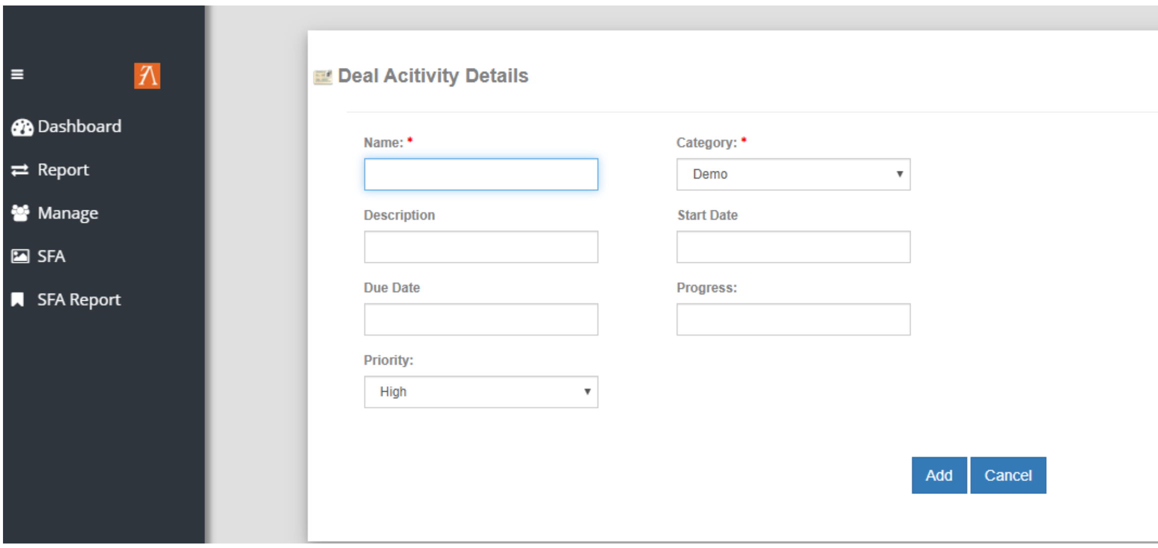
Account creation form which collects information from lead details automatically is shown below.



Opportunity management maintains all the opportunity records for which activity tracking can be added to convert the opportunity to won deal.



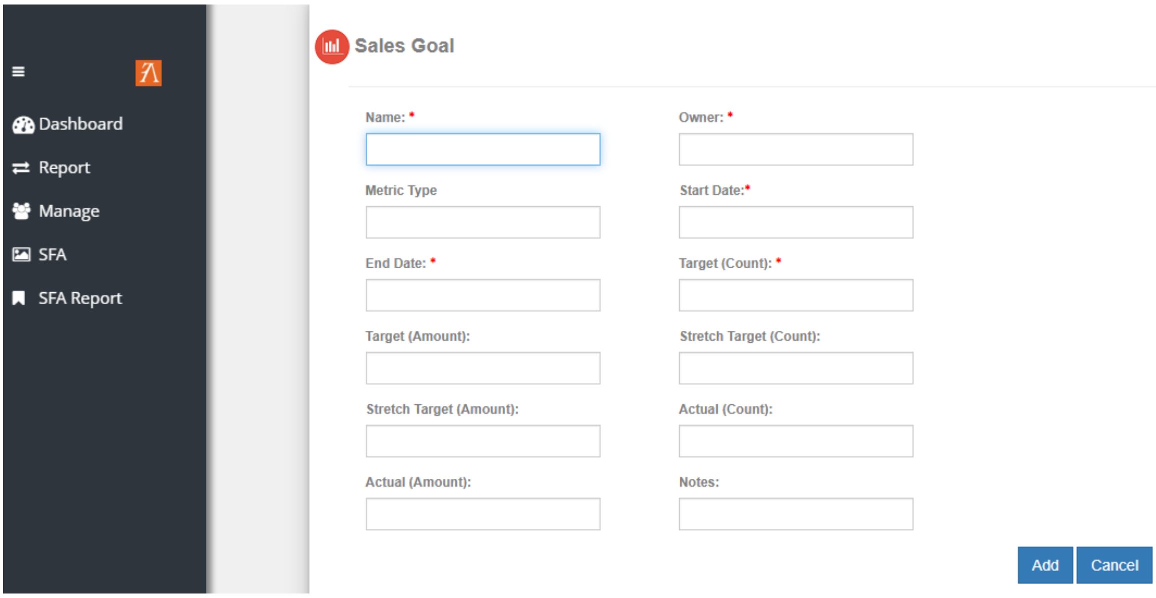
Any opportunity activity creation needs certain types of activity with date and progress details. **Add Activity** action above opens the following form.



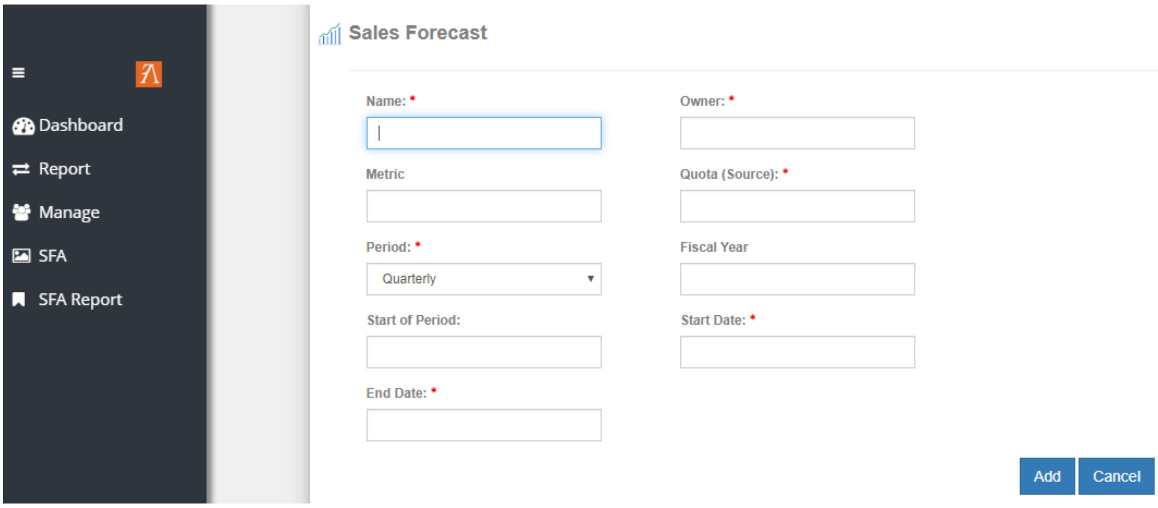
f. **Event management and lead capture** – Any Event can be captured in CRM modules to add participant and register them to it. They can be further followed up to generate sales lead. This helps track all the events and find best suitable way to run product marketing.

g. **Sales Goal and Forecast** – This helps maintain Sales goal for given period and track sales outcome against it. This also help to add Sales forecast for a given period of time.

Sales Goal creation for a given period is shown as follows.



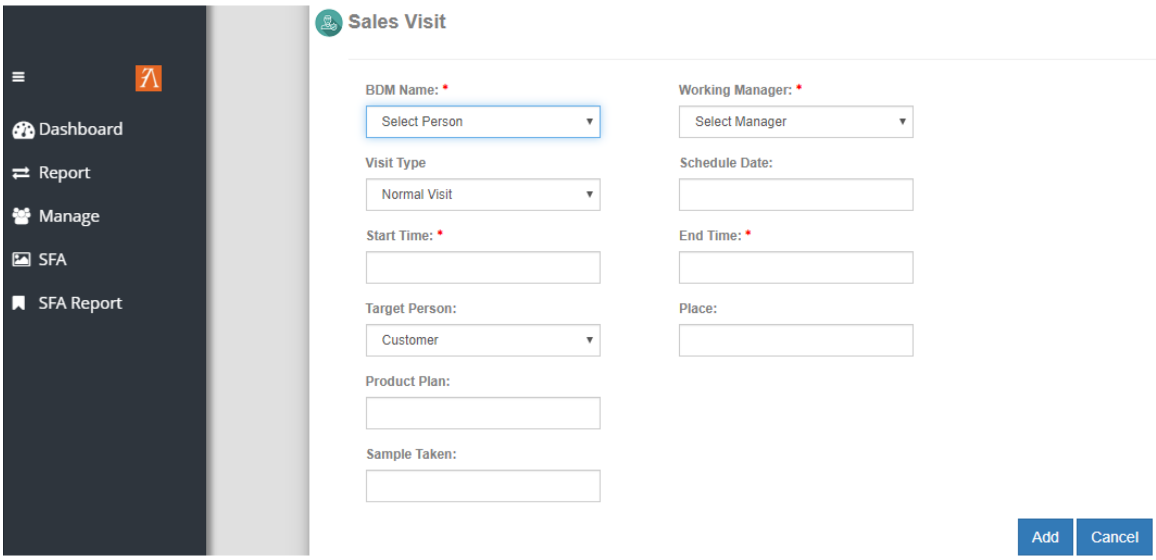
Similarly Sales Forecast addition record needs to be maintained as follows.



FinAcct SFA (Sales Field Automation)

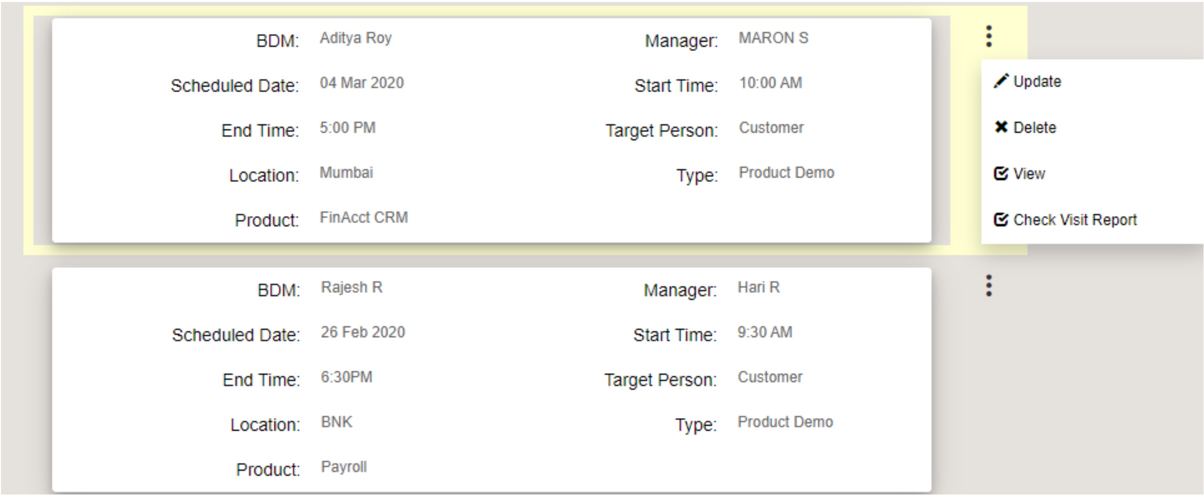
FinAcct CRM Sales Field Automation (SFA) enables company to schedule and run sales person visit and capture their visit record to optimize management of sales force. It also helps company to automate field services of sales person by planning customer visit in a given period and their tour location path.

a. **Sales person activity planning** – add sales person visit schedule for a given date and time with customer product details. The corresponding visit schedule can be checked from each employee login (ESS Portal).



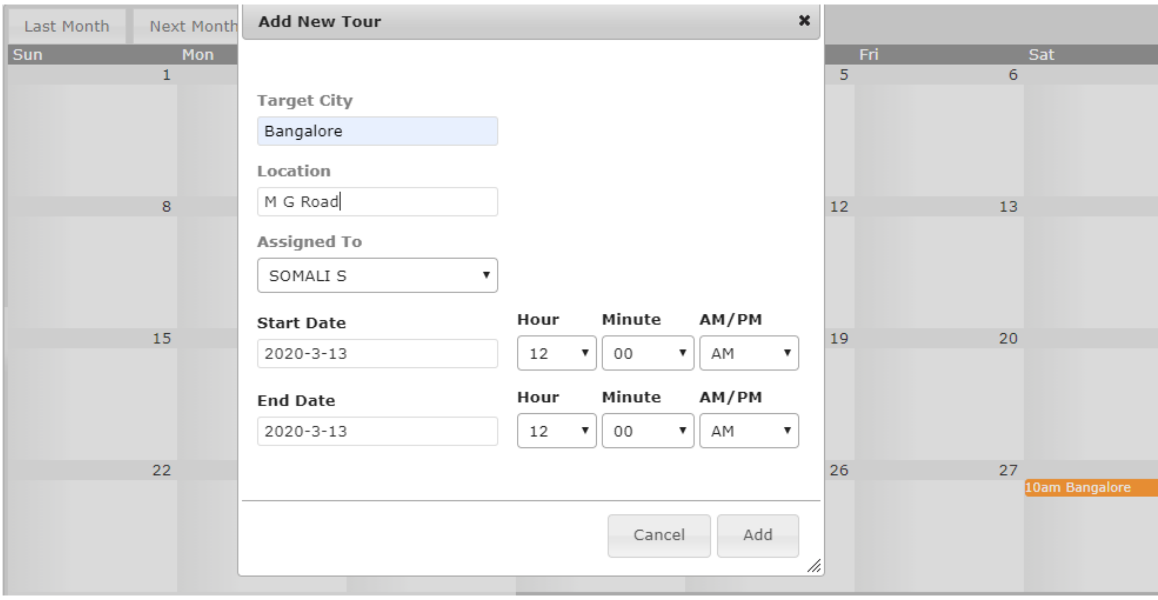
Admin user needs to schedule date and time and allocates to employee with target customer and place in each sales visit.

Sales visit can be managed (edit and delete) from the list of visit schedules as shown below



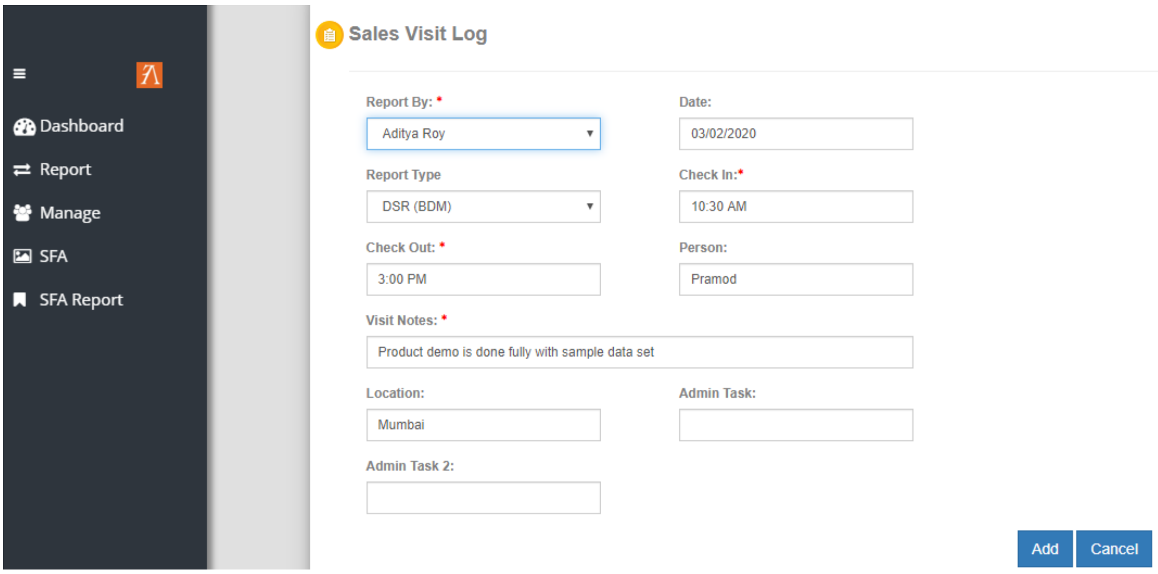
Add or **Check Visit Report** action for a selected Sales Visit record gives option to add visit report by assigned employee. Employee login console has the option to check his/her allocated scheduled visit and update the visit log so that concerned owner of the customer visit can check the status of it. The details of the visit log is shown later.

b. **Sales Person tour planning** – For any sales person, multiple client visits can be scheduled according to optimized route of customer locations so that maximum customer coverage is achieved in shortest time and route path.

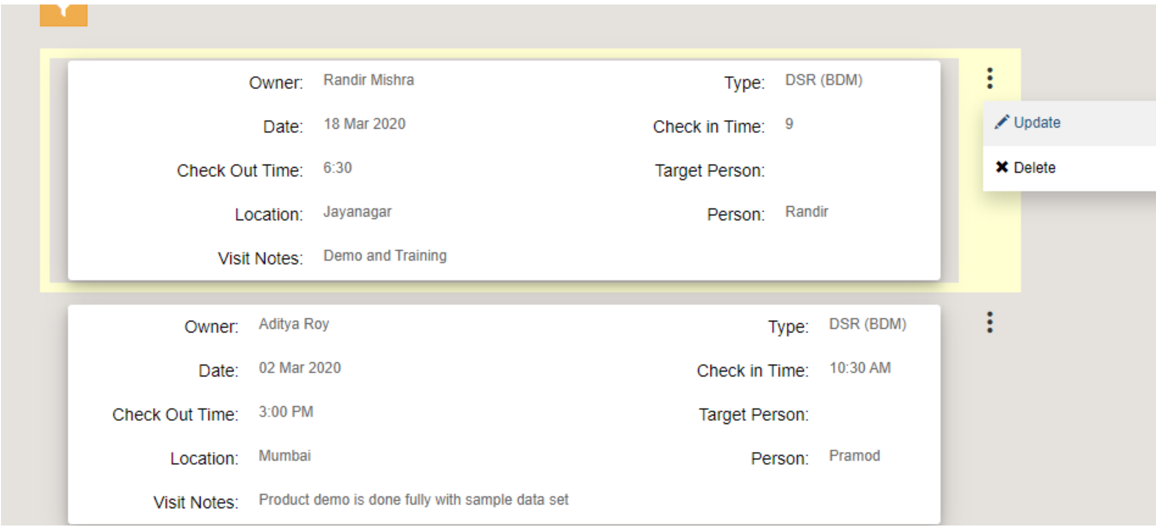


c. **Sales Person Visit report capture** – For every client visit, sales person should maintain visit report which can be verified by manager and above.

As explained in the section of sales person activity planning, sales visit log form has the following data to be filled in.

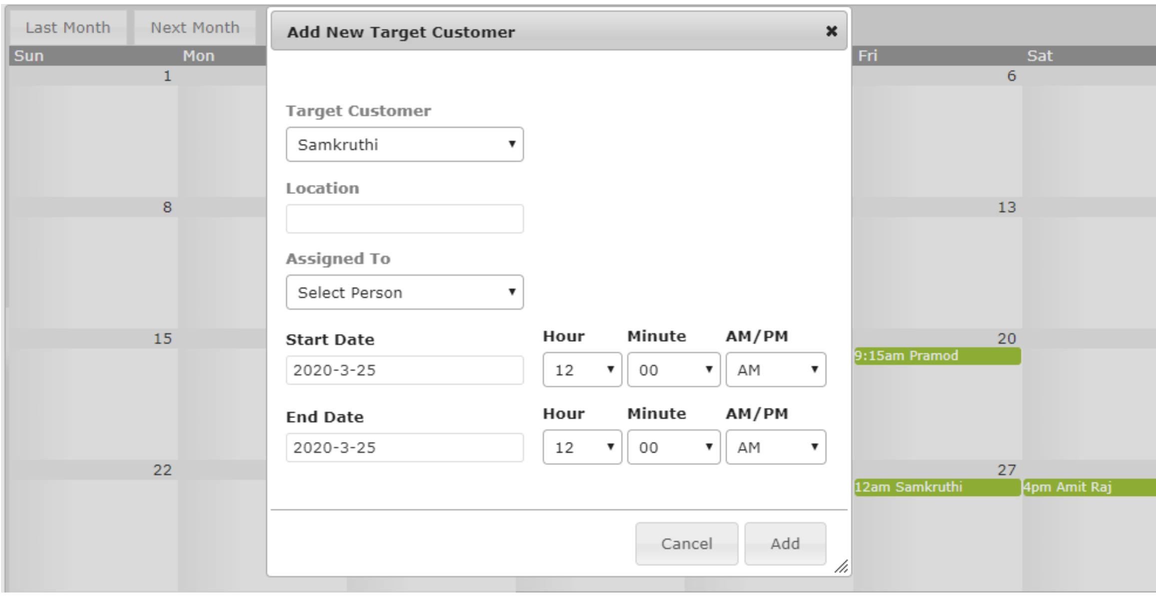


Sales visit log reports can be managed by concerned owner in the following way.



d. **Target Customer planning** – This logs the customer visit details with sales person assigned.

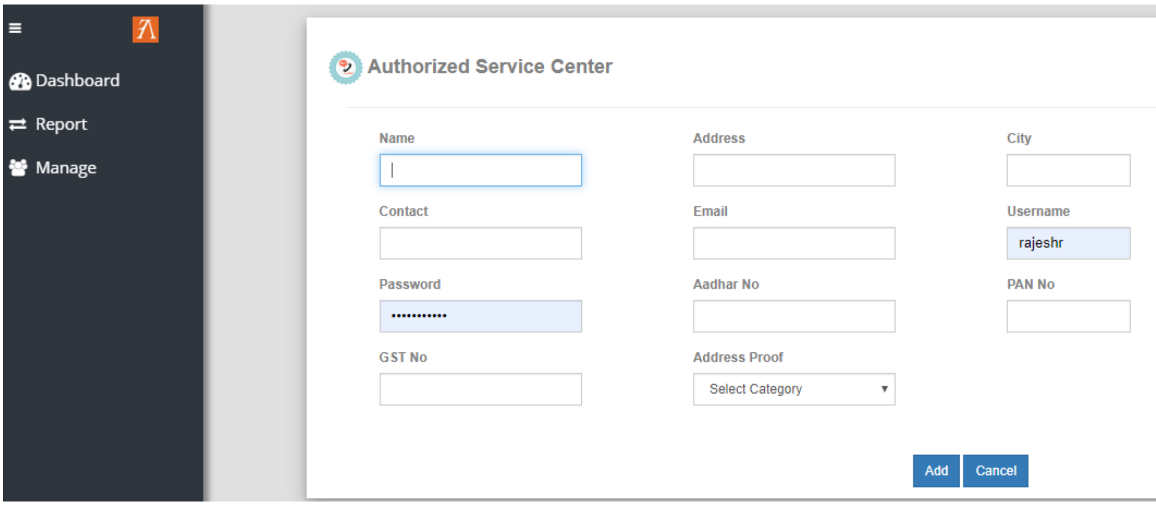
Customer visit can be planned or scheduled on a given date and time for any assigned person. User has the option of adding schedule record from customer target plan form or from calendar sheet. The calendar sheet gives a monthly overview of all the schedules with customer and assigned person at a glance. User can drag and drop the schedule as per the much needed changes using calendar.



CRM Service:

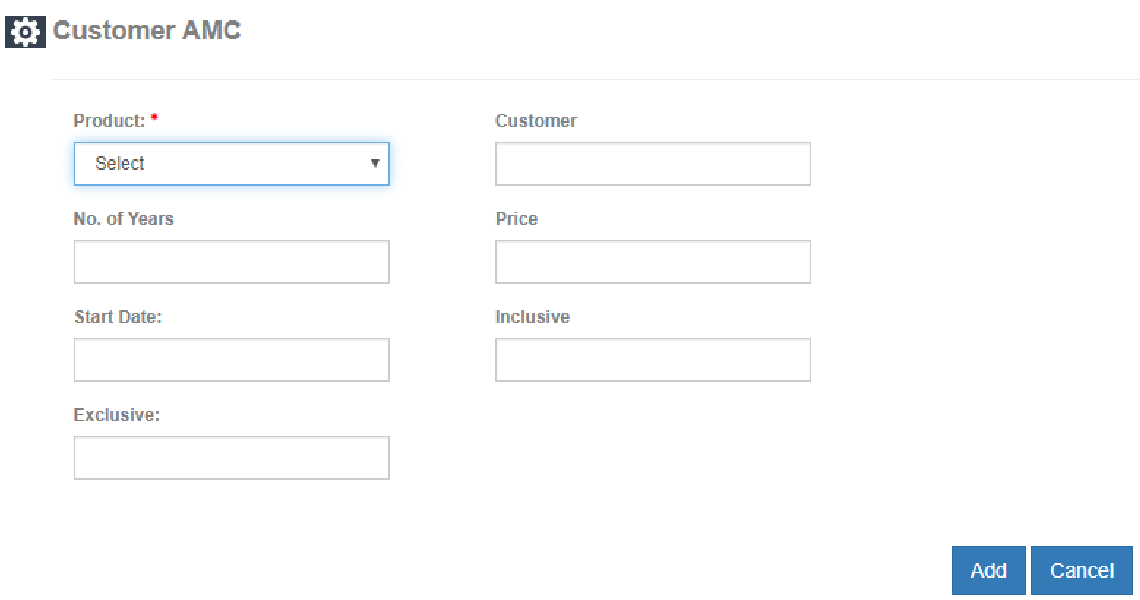
CRM Service handles the after sales service through customer issue and ticket management. For every customer issue logged either by sales person or Authorized Service Centre, unique Job or case ID is generated. This involves allocating case id to concerned service centre and repair management.

a. **Authorised Service Centre Registration** – Service Centres are registered in the system with user credential. They are given access to the FinAcct system so that they can raise service request on behalf of customers for the products and services sold to them. Service Centre registration form is shown below.

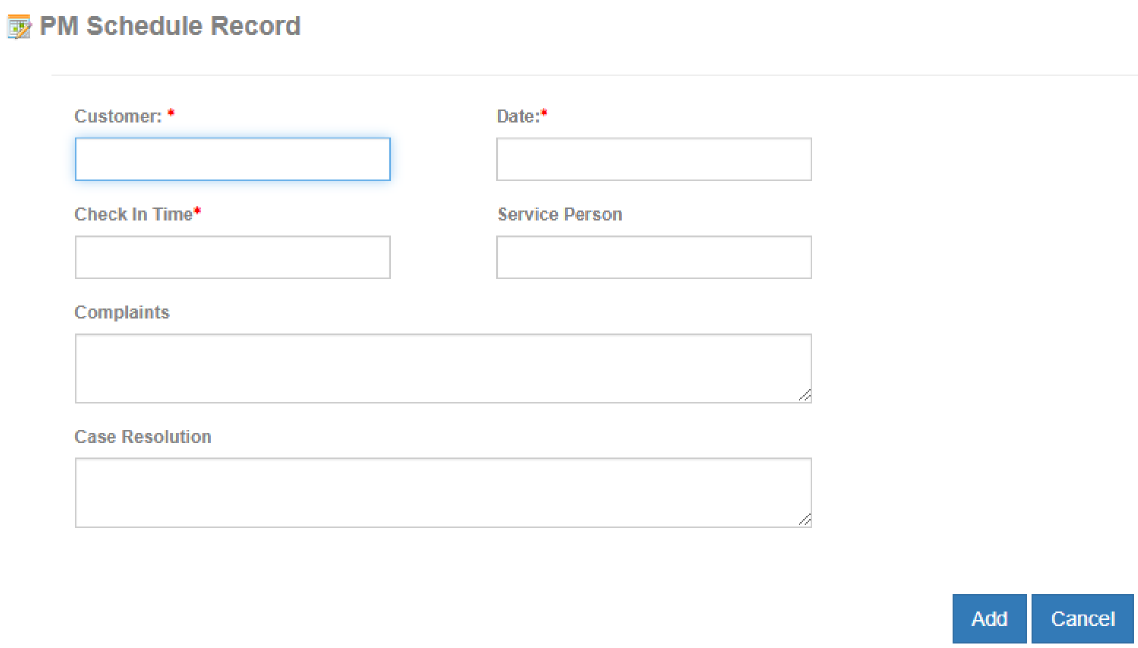


b. **Customer AMC and product warranty management** – The system maintains the warranty details of the product sold to customer and AMC details if used by customer. This helps the company to do better service for repair or replacement for any job ticket.

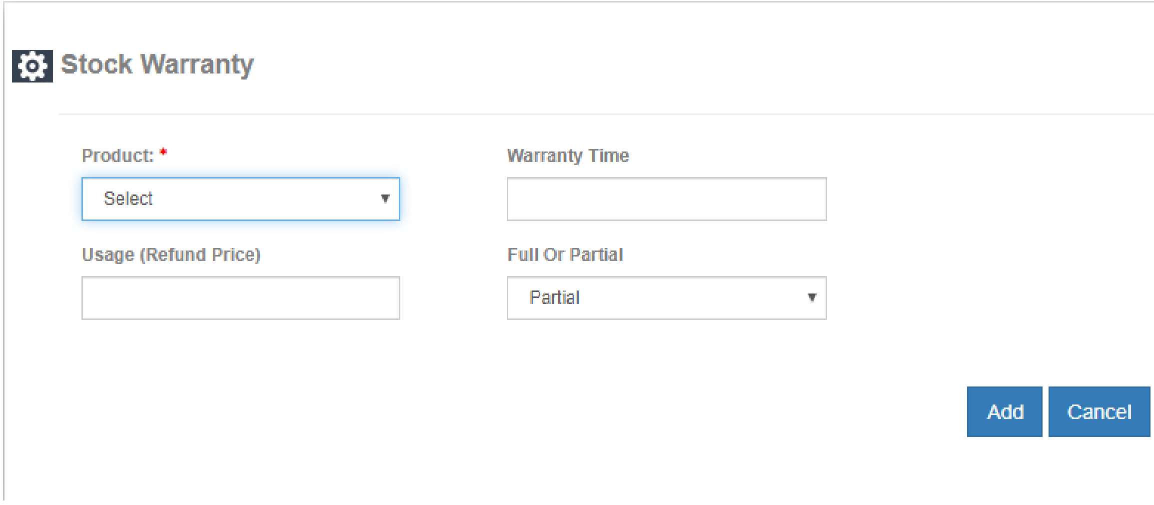
AMC record screenshot is shown below where customer, product details, AMC start date, no. of years and price is mentioned. When any customer issue is addressed, they are handled as per the AMC record.



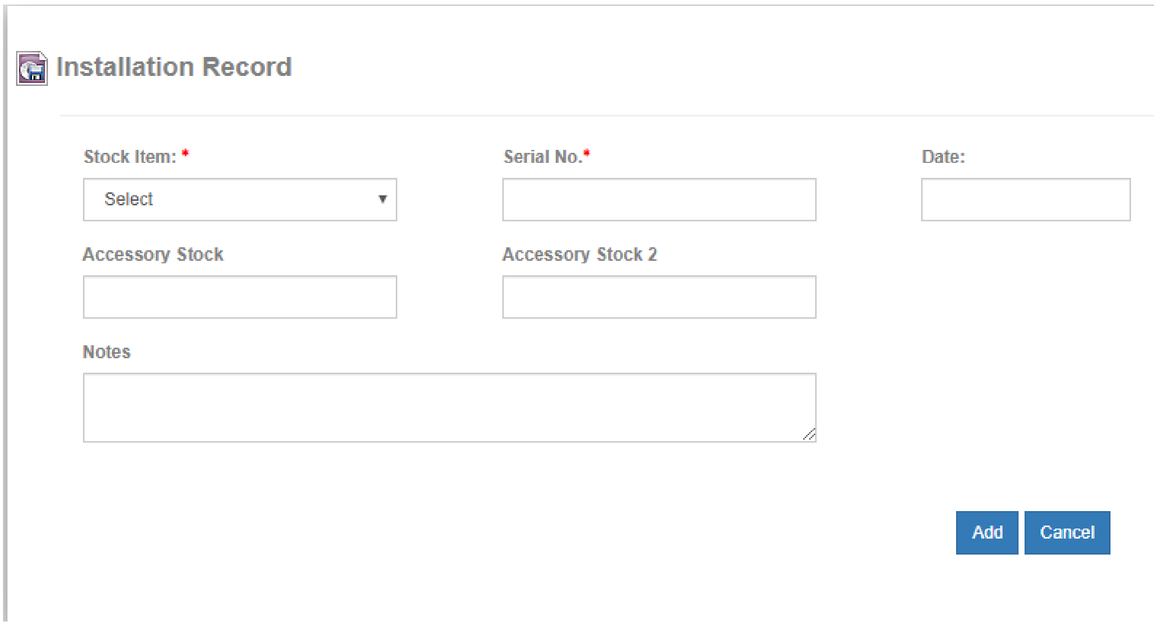
If there is any customer job for Preventive Maintenance, system gives option to add PM schedule record. Current job may refer earlier PM schedule record added in the system, so that customer service can be made much informative and better.



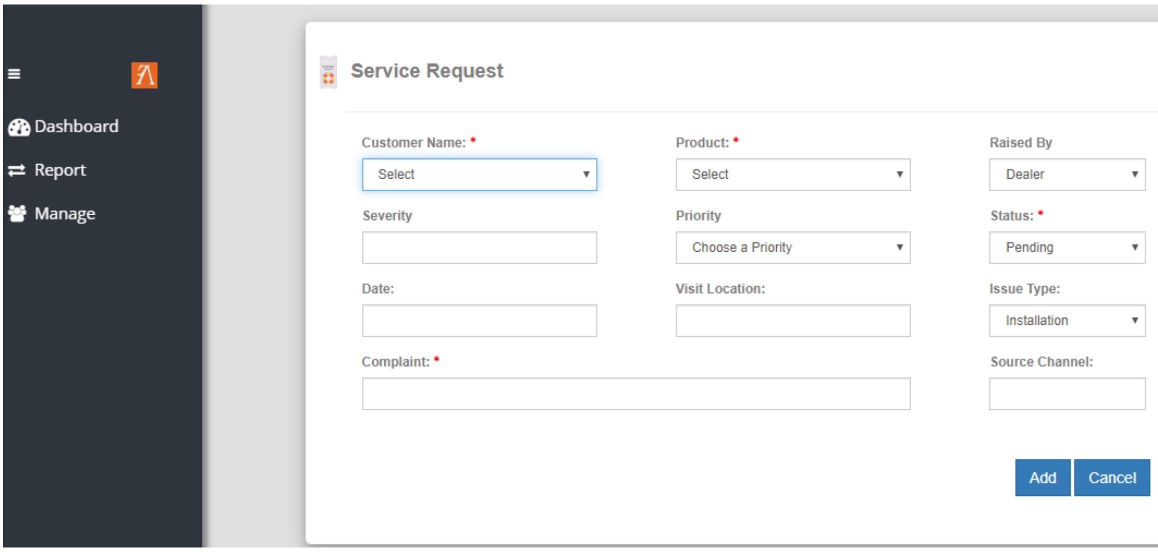
For stock warranty, the details can be put into the system as follows



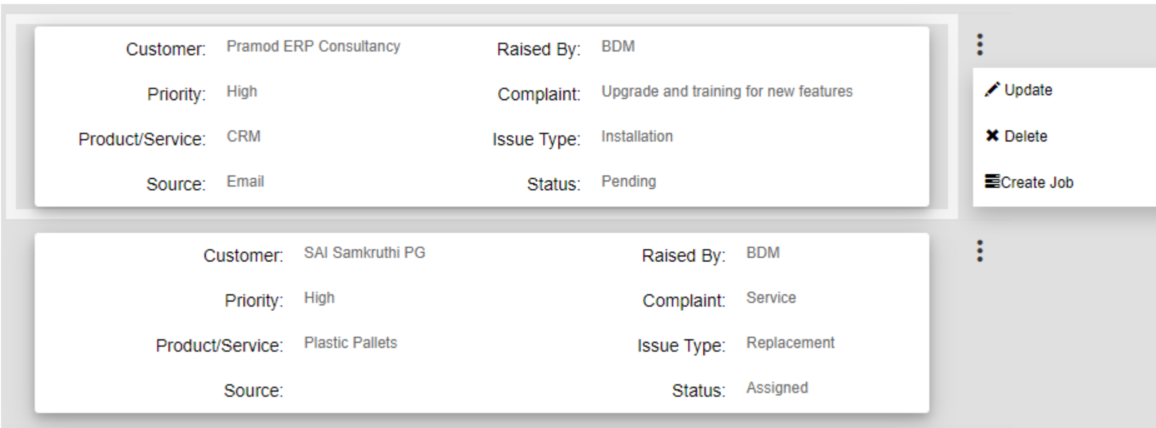
Sometimes, customer service needs some installation of products and services. The information can be captured in installation record form shown below.



c. **Customer Service Request and Job Allocation** – For every customer issue logged into the system, unique Job or Case ID gets generated. Further Activity processing and servicing is referred by this Job ID.

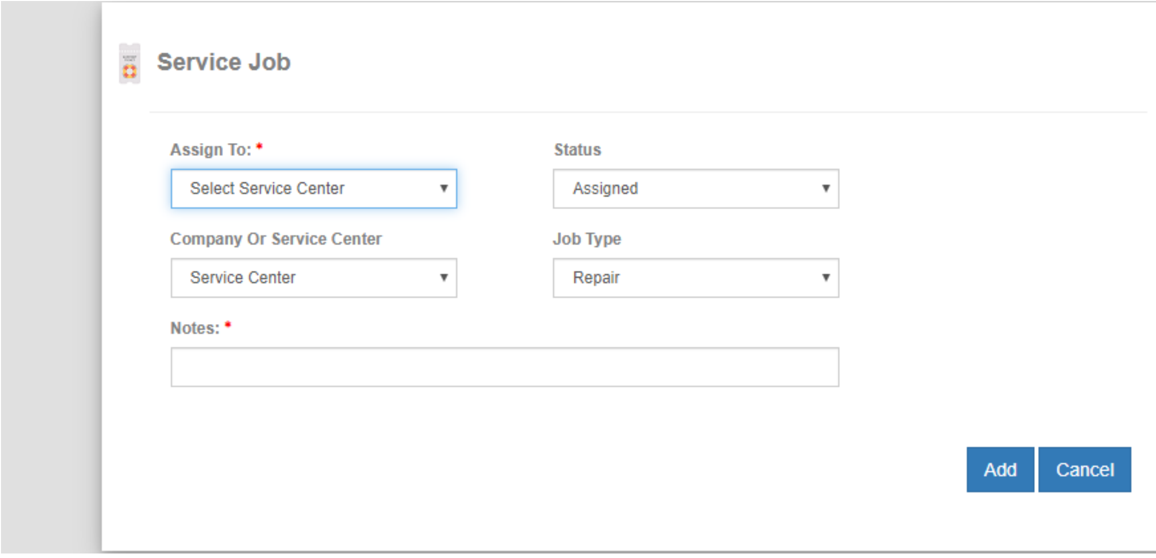


Service Requests are managed by the following way.

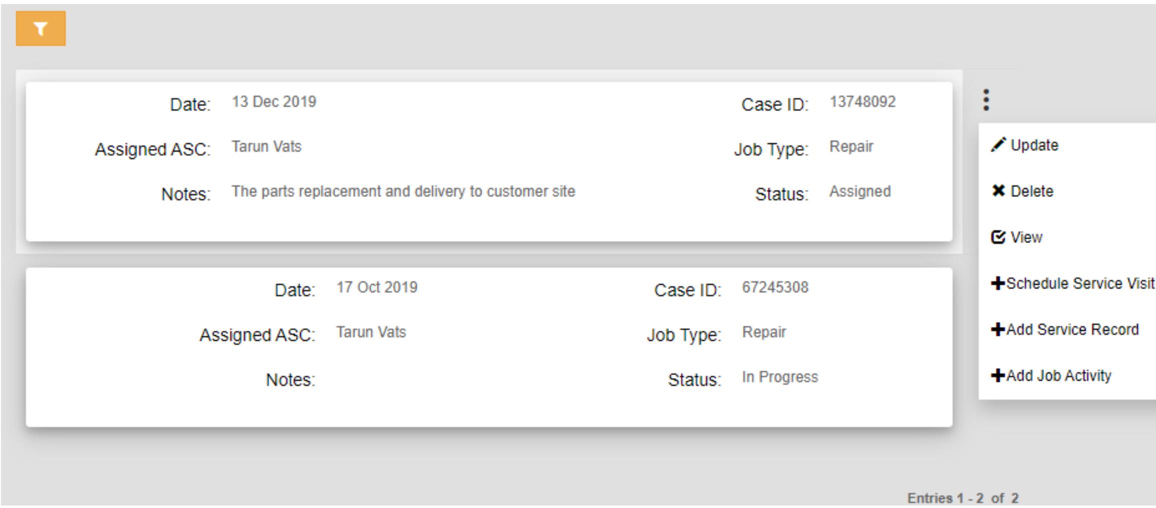


Create Job action for each service request creates actionable job to be assigned to authorized service centre or concerned person in the company.

d. **Service Job Scheduling and management** – Every Job allocated is assigned to authorized service centre or Company Head Quarter. Service visit followed by the job allocation is done subsequently to send repaired or replaced items.

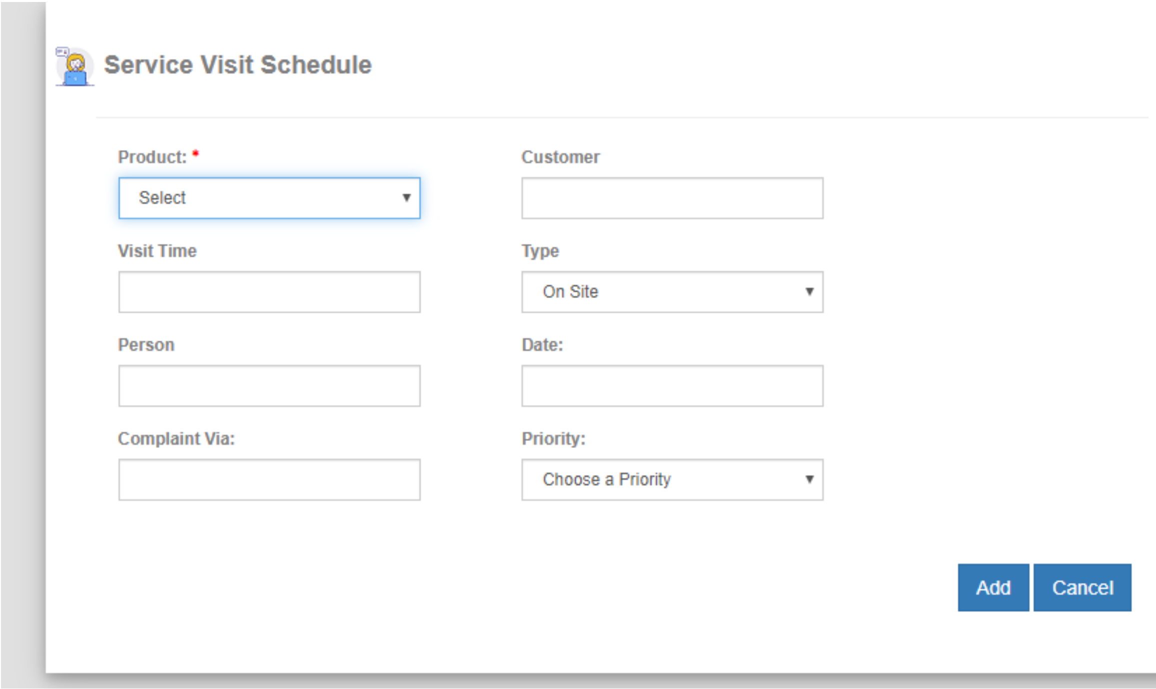


Service Jobs are managed in the following way.

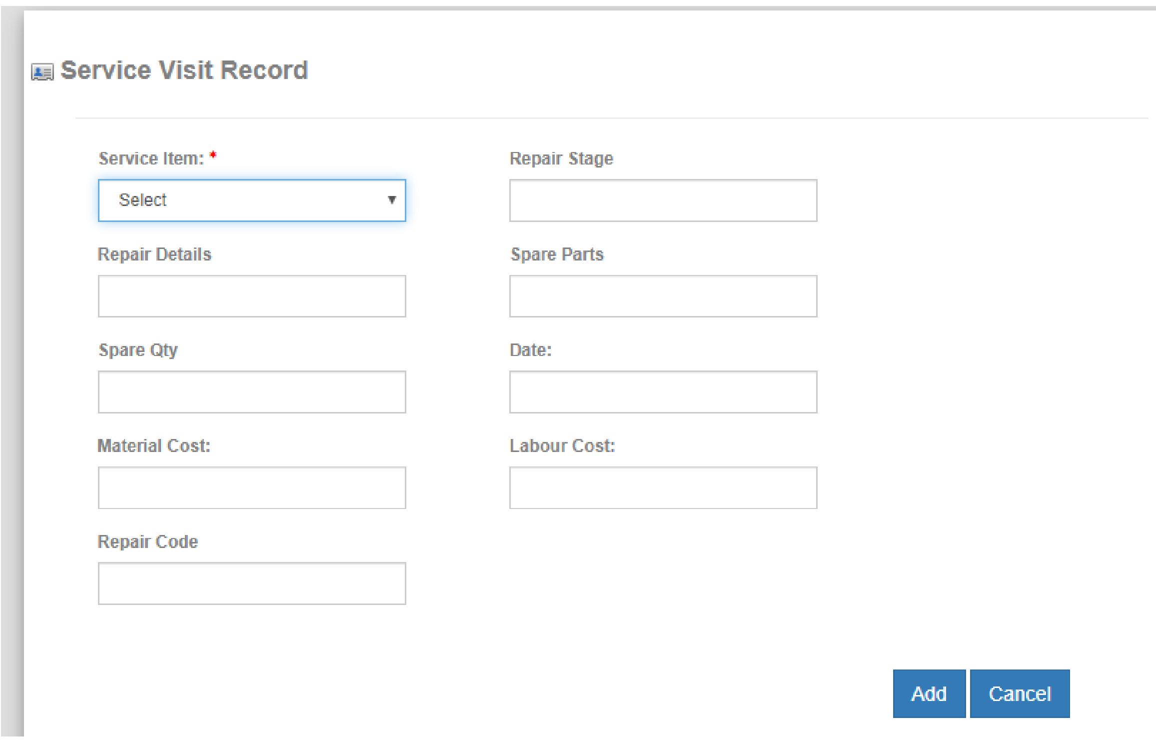


e. **Service Visit record capture** – Every service visit with details of repair and replacement is captured and analysed. This helps company and Service centre to plane for future servicing in better and faster way.

Schedule Service Visit action for each service ticket (shown above) creates service visit schedule as follows. User needs to add details like customer, visit date and time and the person to attend the visit.

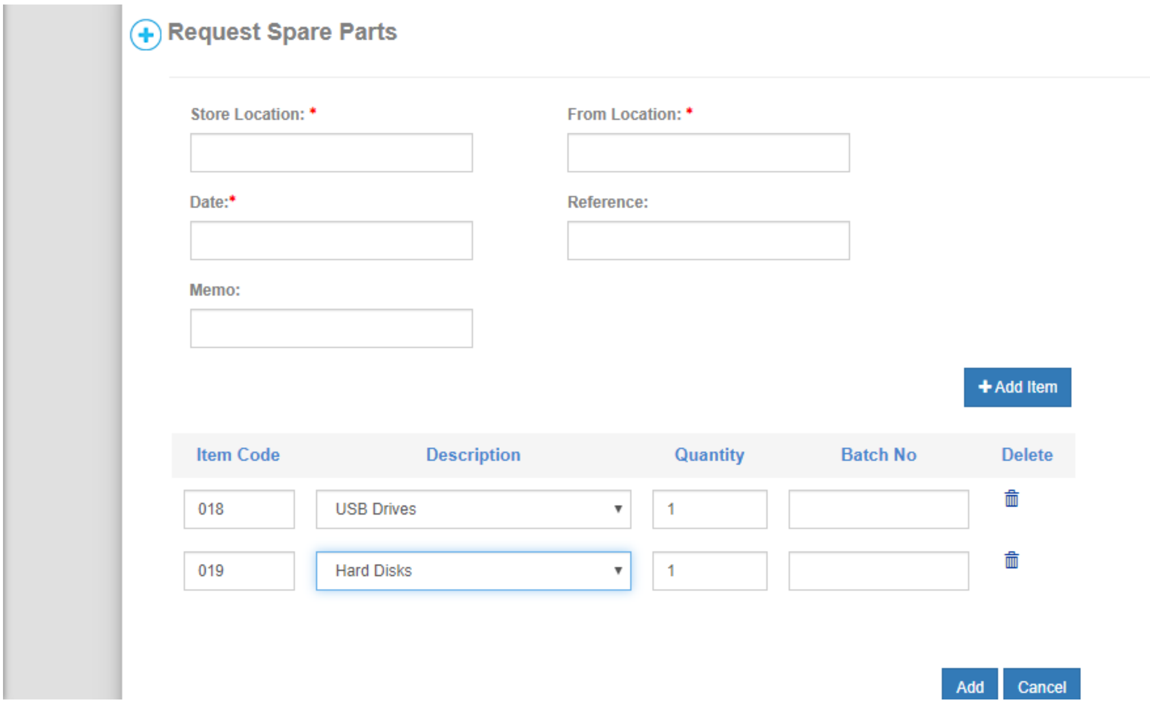


Once visit is complete as per schedule, visit details can be added as per Service Visit Record.

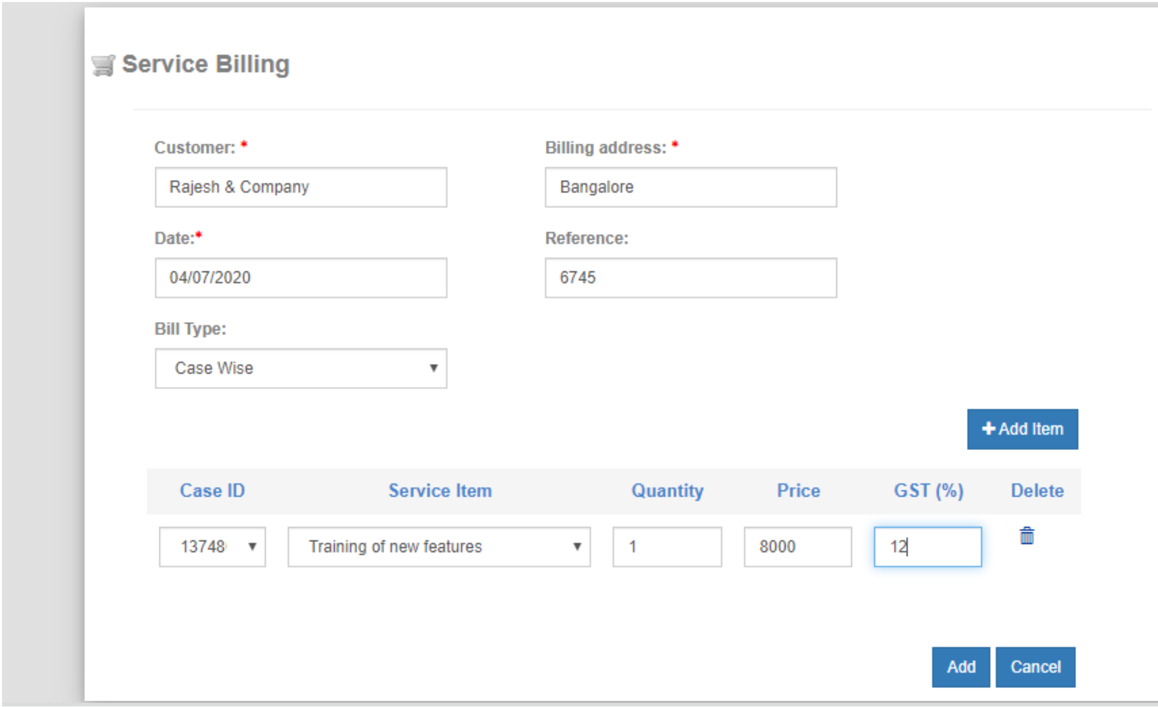


f. Collaboration with Authorised Service Centre (ASC) – ASC can request for spare parts to company head quarter. The company can fulfil the request and raise the bill for that. Company and ASC can collaborate on the customer data like AMC, product warranty, PM schedule etc.

Based on the requirements for replacements and repair, ASC may need to request for spare parts to the vendor which needs to be fulfilled by the company.



g. Service Centre Billing to Vendors – ASC can raise the bills towards service of job ticket to the Vendor (Company).



Service Billing

Customer: *

Rajesh & Company

Billing address: *

Bangalore

Date:*

04/07/2020

Reference:

6745

Bill Type:

Case Wise

+ Add Item

Case ID	Service Item	Quantity	Price	GST (%)	Delete
13748	Training of new features	1	8000	12	

Add Cancel