

# 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:

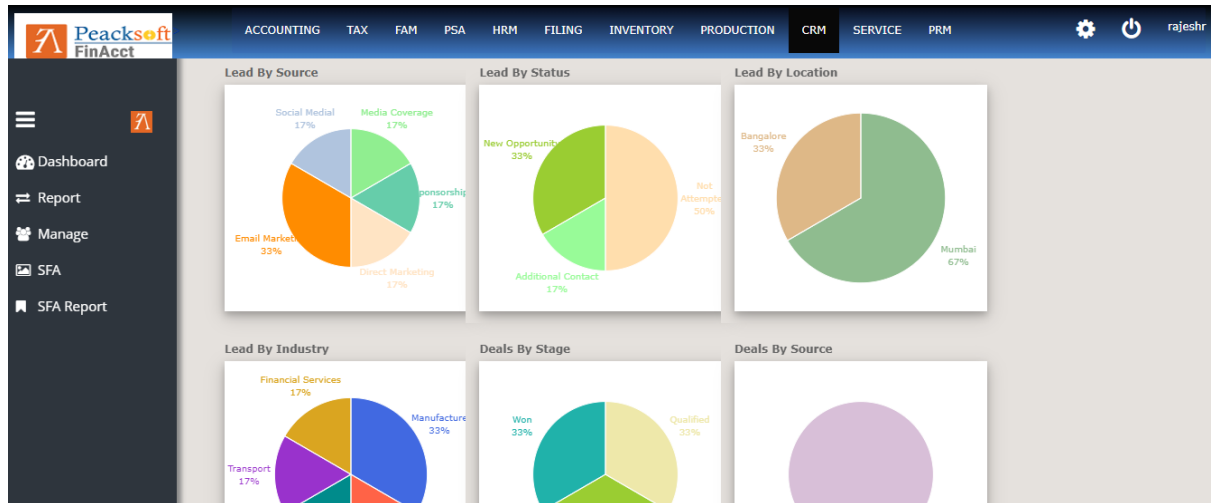


Fig. 1. Leads and Deals Statistics

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.

**Campaign Details**

Name: \*  Tags (Campaign Code)

Description: \*

Start Date: \*  End Date: \*

Email Template:  Type:

Product:  Status:

From Address:  Budget: \*

Total Cost:

Fig2. New Campaign Creation

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

**Marketing Product**

Name: \*  Category: \*

Description: \*

Price: \*  Unit:

Name	Description	Category	Price	Unit	Edit	Delete
FinAcct Payroll	Company Payroll Processing Software		8000.0	NOS		
Plastic Pallets	Plastic Mould	Bakery	200.0	Dozens		

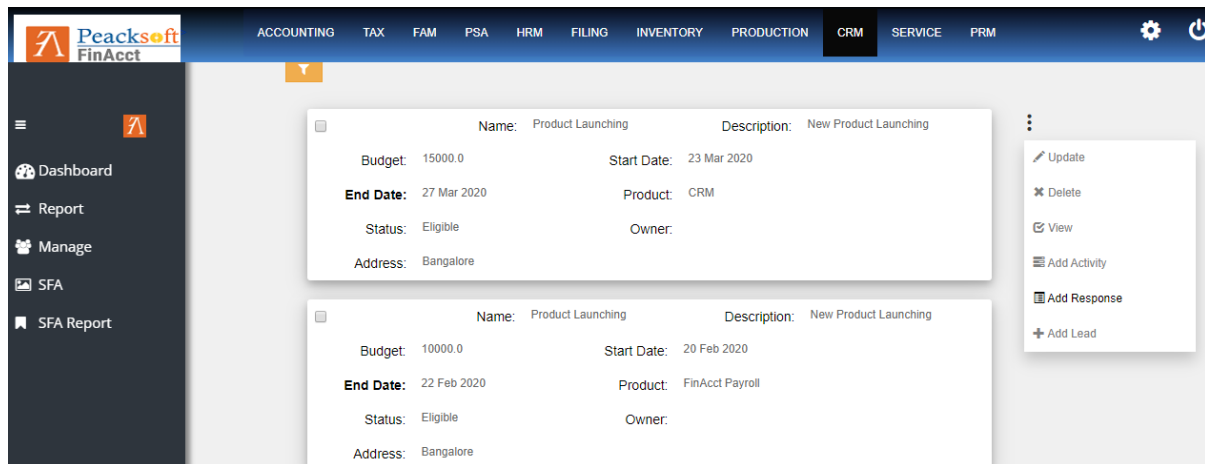


Fig3. Campaign Management

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.

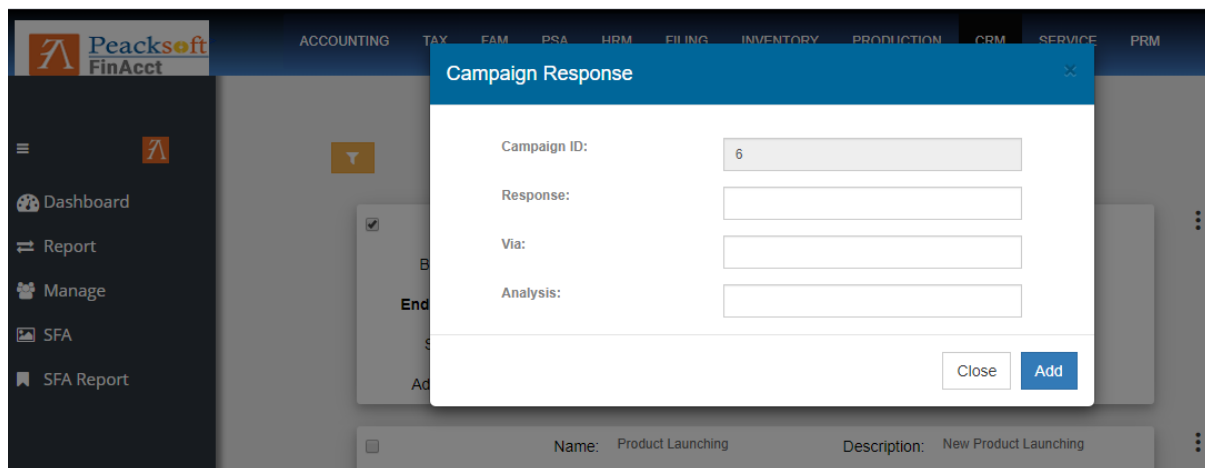
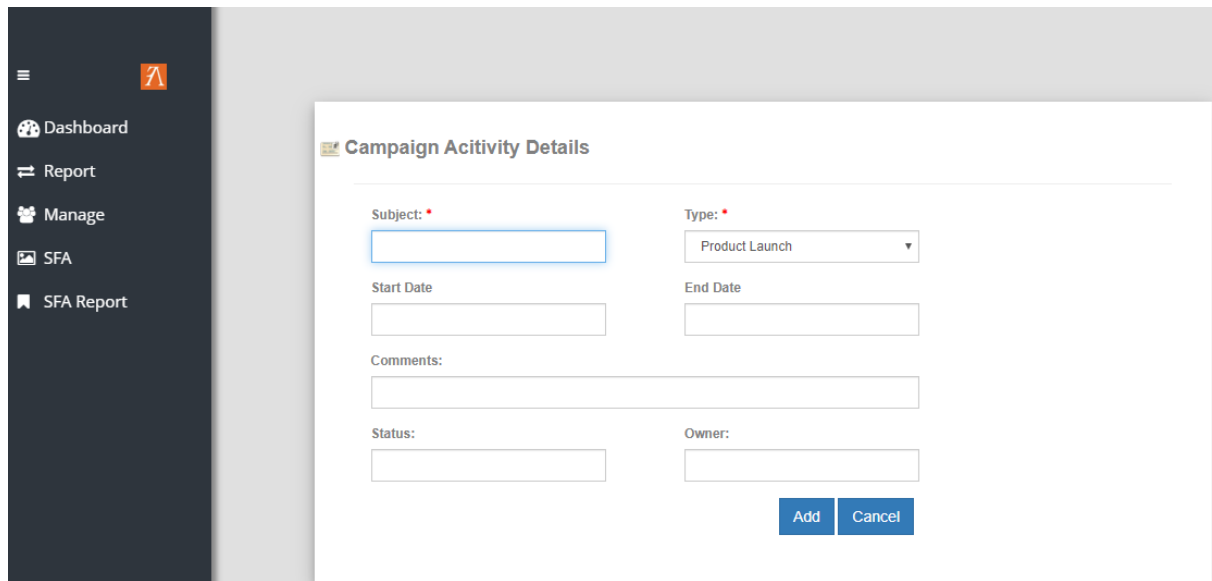


Fig4. Campaign Response capture

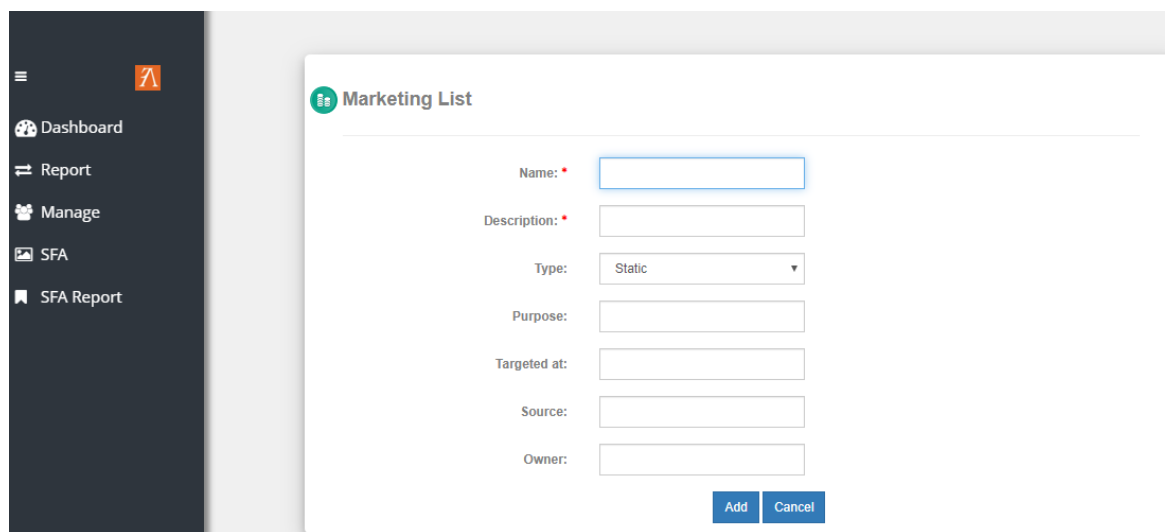
Similarly all campaign activities can be added by the following the operation. **Add Activity** action opens the following form.



The screenshot shows a web application interface with a dark sidebar on the left containing navigation items: Dashboard, Report, Manage, SFA, and SFA Report. The main content area displays a form titled "Campaign Activity Details". The form includes the following fields: "Subject" (text input), "Type" (dropdown menu with "Product Launch" selected), "Start Date" (text input), "End Date" (text input), "Comments" (text area), "Status" (text input), and "Owner" (text input). At the bottom right of the form are two buttons: "Add" and "Cancel".

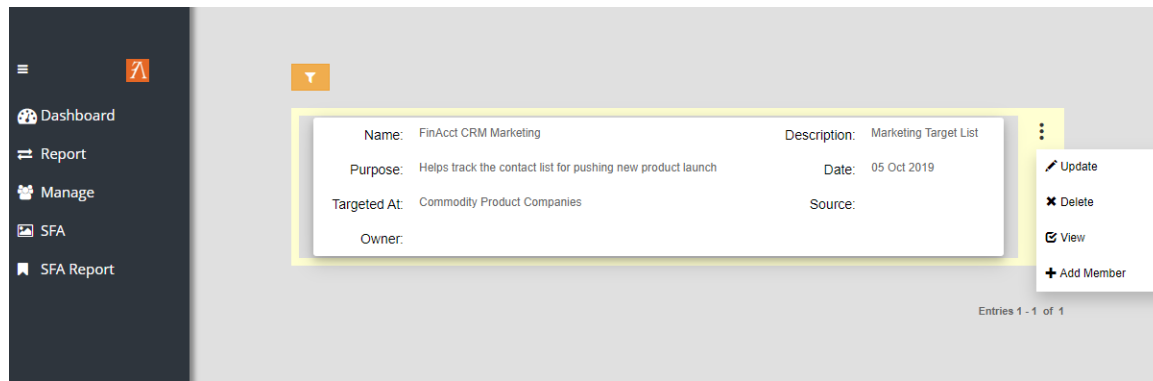
Fig5. Campaign Activity Creation

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



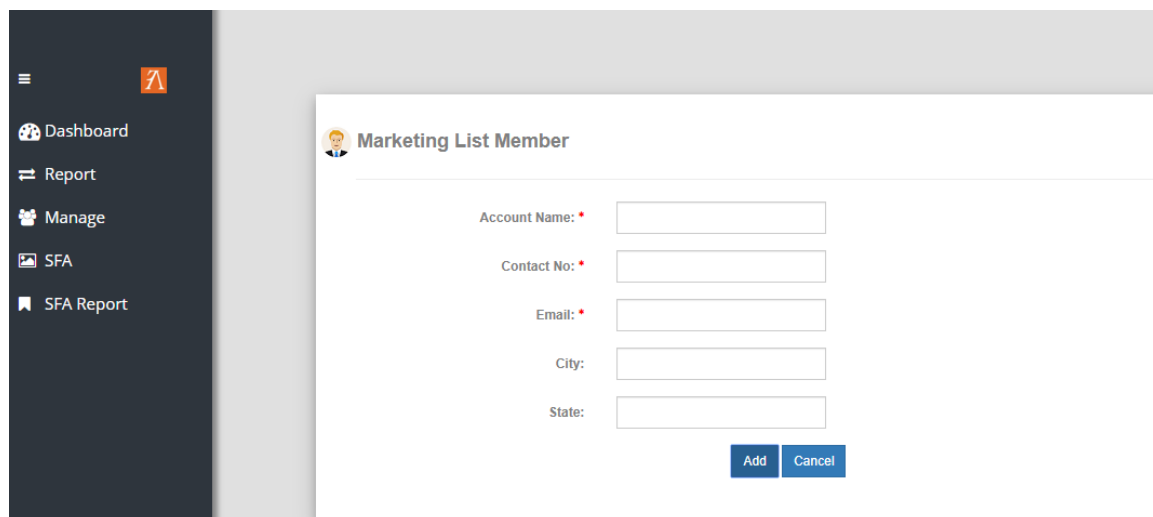
The screenshot shows a web application interface with a dark sidebar on the left containing navigation items: Dashboard, Report, Manage, SFA, and SFA Report. The main content area displays a form titled "Marketing List". The form includes the following fields: "Name" (text input), "Description" (text input), "Type" (dropdown menu with "Static" selected), "Purpose" (text input), "Targeted at" (text input), "Source" (text input), and "Owner" (text input). At the bottom right of the form are two buttons: "Add" and "Cancel".

Fig6. Marketing List Creation



## Marketing List Management

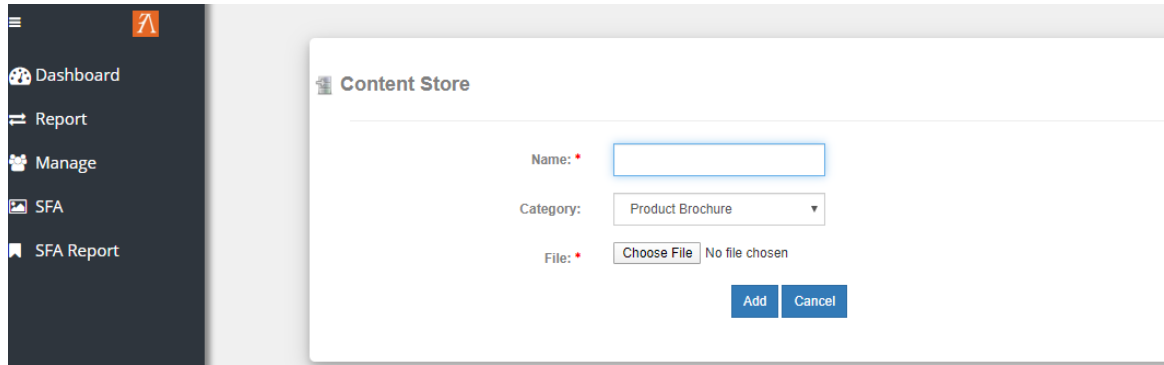
**Add Member** action for a given marketing list creates List Member as shown below



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.

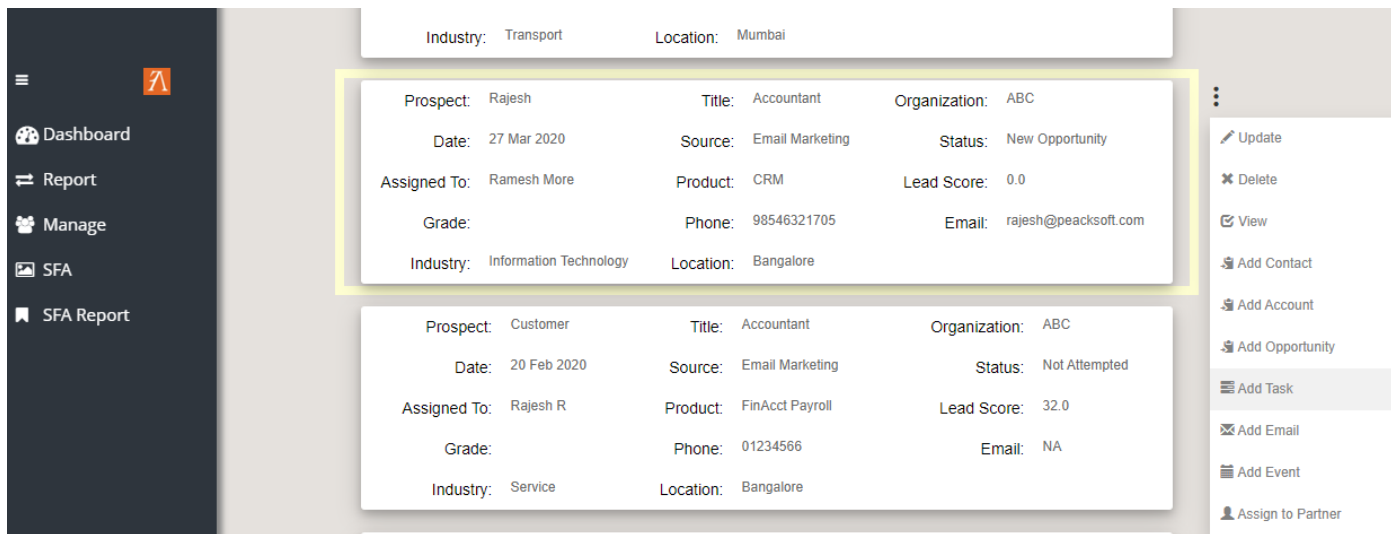


- d. Lead Management – Once lead is added in CRM, all activity via email, event can be tracked in FinAcct. Lead statistics for open/close deals can be generated in lead dashboard.

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

A screenshot of a web application interface showing the 'Lead Details' form. The left sidebar is the same as in the previous image. The main content area is titled 'Lead Details' and contains a form with the following fields: 'Prospect Name:' with an empty text input; 'Organization' with an empty text input; 'Phone:' with an empty text input; 'Email:' with an empty text input; 'Source:' with a dropdown menu showing 'Dealer'; 'Rating(Score):' with an empty text input; 'Assign To:' with a dropdown menu showing 'Assign to Person'; 'Title' with a dropdown menu showing 'Choose a Title'; 'Demography' with a dropdown menu showing 'Choose a Location'; 'Date:' with an empty text input; 'Product:' with a dropdown menu showing 'Select'; 'Type:' with a dropdown menu showing 'Cold Lead'; 'Status:' with a dropdown menu showing 'Not Attempted'; and 'Industry:' with a dropdown menu showing 'Choose a Industry'.

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).

**Lead Task Details**

Name:

Category:

Description:

Start Date:

Due Date:

Progress:

Priority:

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

The screenshot shows a sidebar on the left with navigation options: Dashboard, Report, Manage, SFA, and SFA Report. The main content area is titled 'Lead Email Details' and contains the following fields:

- To:** info@peacksoft.com
- Subject:** (empty text box)
- Priority:** Medium (dropdown menu)
- Content:** (empty text area)

Buttons: Add, Cancel

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

The screenshot shows the same sidebar as the previous image. The main content area is titled 'Lead Event Details' and contains the following fields:

- Title:** (empty text box)
- Location:** (empty text box)
- Description:** (empty text box)
- Start Date:** (empty text box)
- End Date:** (empty text box)
- Start Time:** (empty text box)
- End Time:** (empty text box)

Buttons: Add, Cancel

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.



The screenshot shows a CRM dashboard with a sidebar on the left containing navigation items: Dashboard, Report, Manage, SFA, and SFA Report. The main content area displays lead details for a prospect named Rajesh, including title (Accountant), organization (ABC), date (27 Mar 2020), source (Email Marketing), status (New Opportunity), assigned to (Ramesh More), product (CRM), and lead score (0.0).

Below the lead details is a 'Lead Activity' table with the following data:

Date	Type	Name	Description	Start Date	End Date	Status	Notes	Reminder	More
27 Mar 2020	Task	Raj	Demo:Demo given to customer	24 Mar 2020	24 Mar 2020	Interested			
27 Mar 2020	Task	Customer	Demo:Demo given to customer	24 Mar 2020	27 Mar 2020	Called			
27 Mar 2020	Event	Branding	Bangalore.Brand launh	27 Mar 2020	27 Mar 2020				

A context menu is visible over the 'More' column of the first row, containing options: Edit, Delete, and Activity Notes.

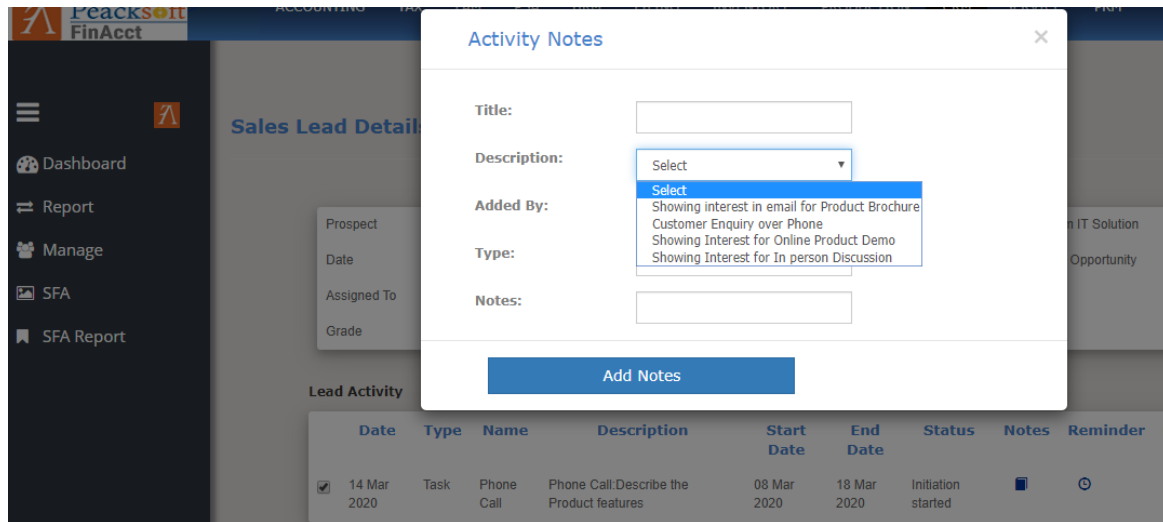
User needs to select any lead activity and click on Reminder button to set the reminder to any given date and time. The owner of the task will get email notification on the date set in the reminder.

The screenshot shows the 'Sales Lead Detail' page with a 'Reminder' popup window open. The popup contains the following fields:

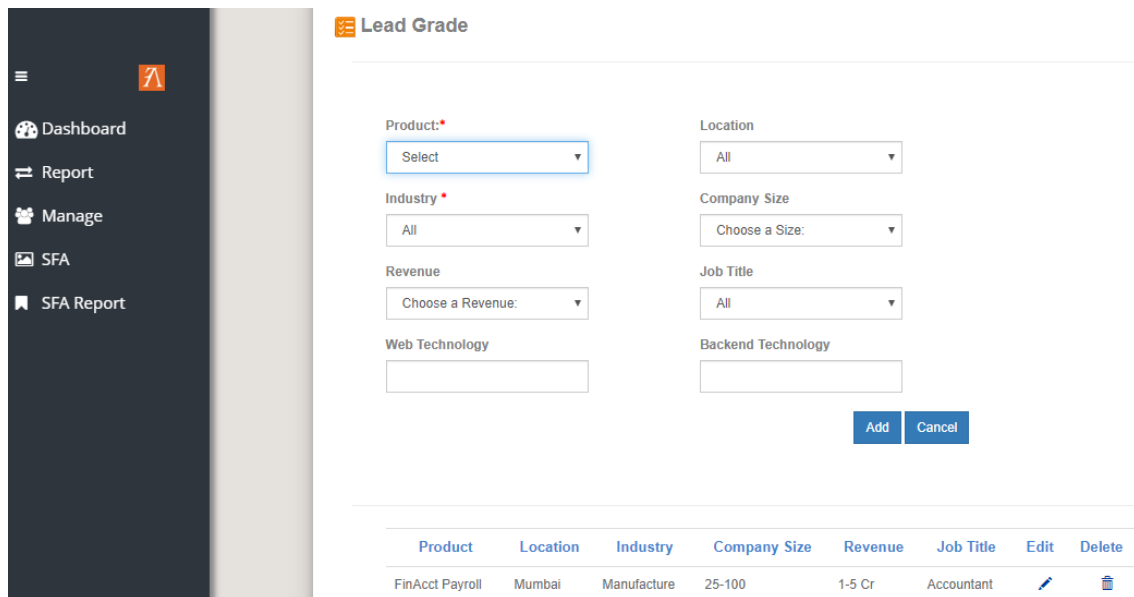
- Start Date: 04/09/2020
- Time: 11:00 AM
- Activity: Meeting (selected from a dropdown menu)
- Type: Meeting (selected from a dropdown menu)

At the bottom of the popup is a blue button labeled 'Add Reminder'. The background shows the same 'Lead Activity' table as in the previous screenshot, with the first row selected.

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.

Sr.	Description	Score	Max Score	Action
1.	Showing interest in email for Product Brochure	6	12	
2.	Customer Enquiry over Phone	10	15	
3.	Showing Interest for Online Product Demo	12	15	
4.	Showing Interest for In person Discussion	15	15	

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.

The image shows a screenshot of a CRM application interface. On the left is a dark sidebar with a menu containing: Dashboard, Report, Manage, SFA, and SFA Report. The main content area is titled 'Lead Contact' and contains a form with the following fields and values:

Field	Value
Name *	Rajesh
Title	
Organization *	ABC
Address	Bangalore
Phone *	98546321705
Email *	rajesh@peacksoft.com
State	

At the bottom right of the form are two buttons: 'Add' and 'Cancel'.

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

**Customer Account Details**

Name:

Website:

Organization \* :

Industry:

Phone \* :

Email \* :

Expected Revenue:

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

Name:	Peack	Organization:	peack
Deal Value:	30000.0	Forecast Close Date:	30 Mar 2020
Probability (Winning):	50.0	Pipeline Stage:	Qualified
Status:	Created		
Name:	CRM for Prism IT	Organization:	Prism IT Solution
Deal Value:	50000.0	Forecast Close Date:	15 Apr 2020
Probability (Winning):	50.0	Pipeline Stage:	Engaging
Status:	Contact Progress		

- Update
- Delete
- View
- Add Activity
- Add Quotation

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

**Deal Activity Details**

Name \* :

Category \* :

Description:

Start Date:

Due Date:

Progress:

Priority:

- 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.

The screenshot shows a web application interface for creating a Sales Goal. On the left is a dark sidebar with navigation options: Dashboard, Report, Manage, SFA, and SFA Report. The main content area is titled 'Sales Goal' and contains a form with the following fields:

Name: *	Owner: *
Metric Type	Start Date: *
End Date: *	Target (Count): *
Target (Amount):	Stretch Target (Count):
Stretch Target (Amount):	Actual (Count):
Actual (Amount):	Notes:

At the bottom right of the form are two buttons: 'Add' and 'Cancel'.

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

**Sales Forecast**

Name:

Owner:

Metric:

Quota (Source):

Period:

Fiscal Year:

Start of Period:

Start Date:

End Date:

## 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).

**Sales Visit**

BDM Name:

Working Manager:

Visit Type:

Schedule Date:

Start Time:

End Time:

Target Person:

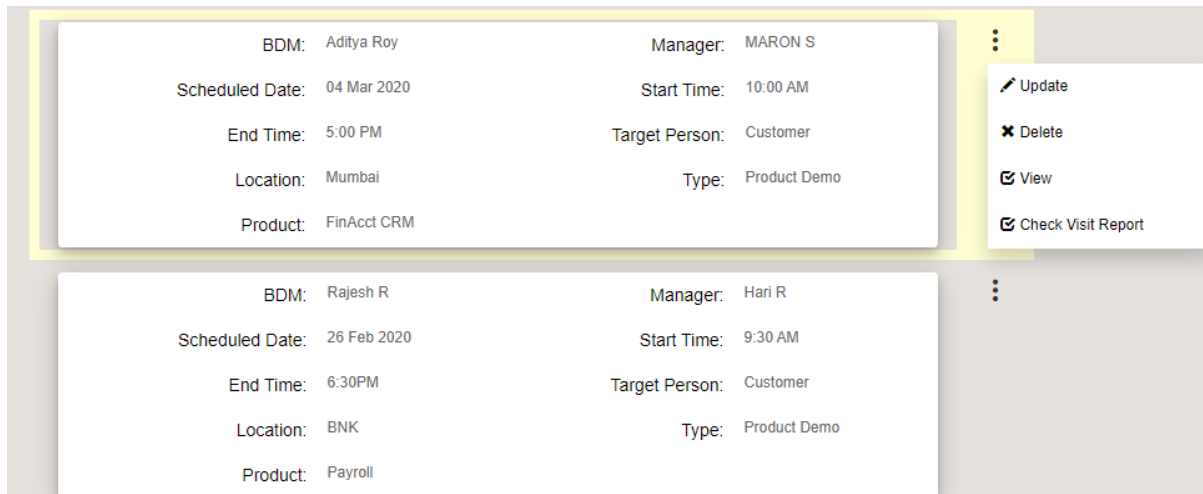
Place:

Product Plan:

Sample Taken:

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



The screenshot displays a list of sales visit schedules. The first record is highlighted with a yellow border. To its right, a dropdown menu is open, showing four actions: Update, Delete, View, and Check Visit Report. The second record is visible below the first.

Field	Value	Field	Value
BDM:	Aditya Roy	Manager:	MARON S
Scheduled Date:	04 Mar 2020	Start Time:	10:00 AM
End Time:	5:00 PM	Target Person:	Customer
Location:	Mumbai	Type:	Product Demo
Product:	FinAcct CRM		

BDM:	Rajesh R	Manager:	Hari R
Scheduled Date:	26 Feb 2020	Start Time:	9:30 AM
End Time:	6:30PM	Target Person:	Customer
Location:	BNK	Type:	Product Demo
Product:	Payroll		

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.



The screenshot shows a 'Sales Person Visit report capture' form overlaid on a calendar. The form is titled 'Add New Tour' and contains the following fields:

- Target City:** Bangalore
- Location:** M G Road
- Assigned To:** SOMALI S
- Start Date:** 2020-3-13
- End Date:** 2020-3-13
- Time:** 12:00 AM

Buttons for 'Cancel' and 'Add' are located at the bottom right of the form.

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

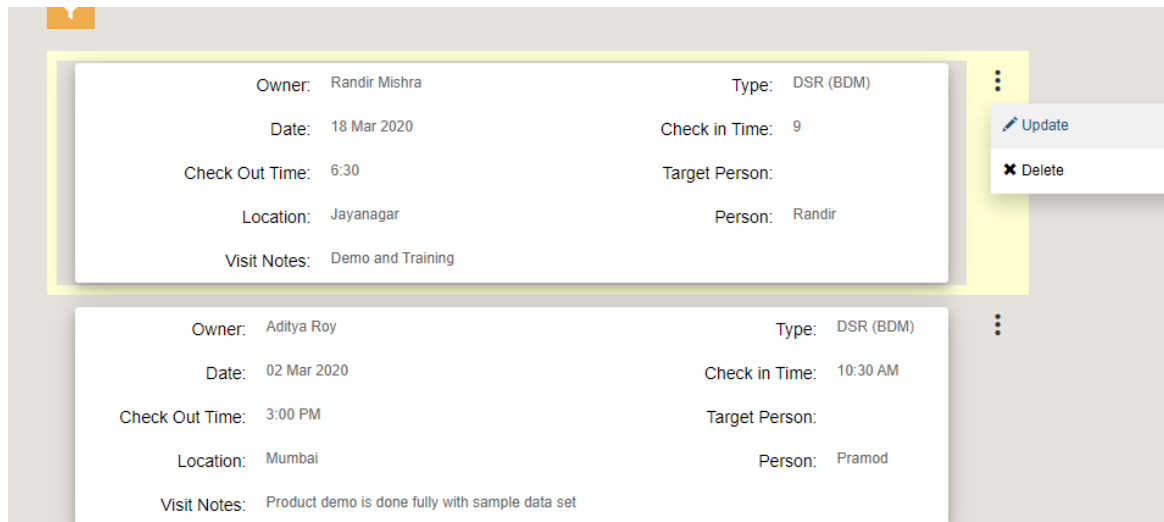
As explained in the section of sales person activity planning, sales visit log form has the following data to be filled in.

The screenshot shows a 'Sales Visit Log' form with the following fields:

- Report By:** Aditya Roy
- Date:** 03/02/2020
- Report Type:** DSR (BDM)
- Check In:** 10:30 AM
- Check Out:** 3:00 PM
- Person:** Pramod
- Visit Notes:** Product demo is done fully with sample data set
- Location:** Mumbai
- Admin Task:** (Empty field)
- Admin Task 2:** (Empty field)

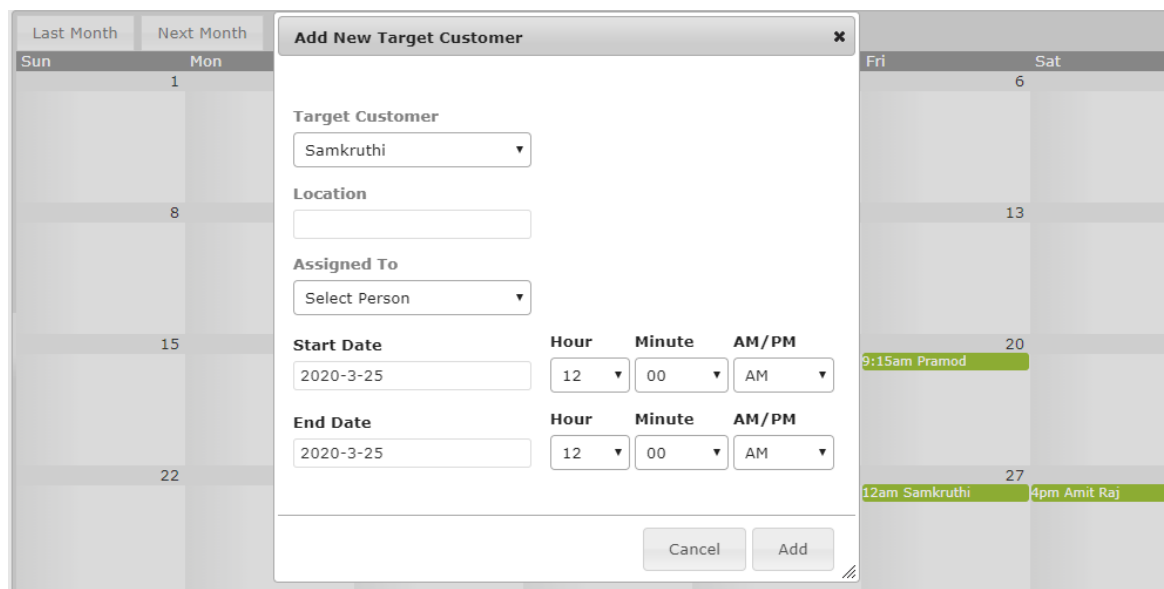
Buttons for 'Add' and 'Cancel' are located at the bottom right of the form.

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.

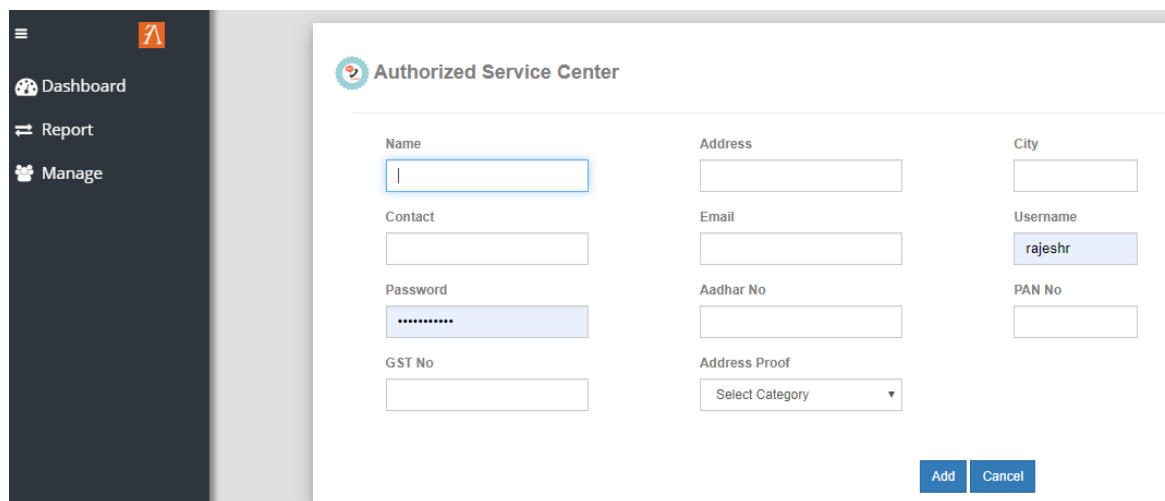
Customer visit can be planned or scheduled on a given date and time for any assigned person. User has the option of adding schedule record from customer target plan form or from calendar sheet. The calendar sheet gives a monthly overview of all the schedules with customer and assigned person at a glance.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



The screenshot displays a web application interface for 'Authorized Service Center' registration. On the left is a dark sidebar with navigation options: 'Dashboard', 'Report', and 'Manage'. The main content area features a form with the following fields:

- Name:
- Contact:
- Password:
- GST No:
- Address:
- Email:
- Aadhar No:
- Address Proof:
- City:
- Username:
- PAN No:

At the bottom right of the form are two buttons: 'Add' and 'Cancel'.

- 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.

## Customer AMC


Product: *	Customer
<input type="text" value="Select"/>	<input type="text"/>
No. of Years	Price
<input type="text"/>	<input type="text"/>
Start Date:	Inclusive
<input type="text"/>	<input type="text"/>
Exclusive:	
<input type="text"/>	

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.

## PM Schedule Record

Customer: *	Date: *
<input type="text"/>	<input type="text"/>
Check In Time*	Service Person
<input type="text"/>	<input type="text"/>
Complaints	
<input type="text"/>	
Case Resolution	
<input type="text"/>	

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

 **Stock Warranty**

---


Product: \*  ▼

Warranty Time

Usage (Refund Price)

Full Or Partial  ▼

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

 **Installation Record**

---

Stock Item: \*  ▼

Serial No. \*

Date:

Accessory Stock

Accessory Stock 2

Notes

- 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 Request**

Customer Name: \*

Product: \*

Severity

Priority

Date:

Visit Location:

Complaint: \*

Raised By

Status: \*

Issue Type:

Source Channel:

Service Requests are managed by the following way.

Customer: Pramod ERP Consultancy	Raised By: BDM	<ul style="list-style-type: none"> <li>Update</li> <li>Delete</li> <li>Create Job</li> </ul>
Priority: High	Complaint: Upgrade and training for new features	
Product/Service: CRM	Issue Type: Installation	
Source: Email	Status: Pending	
Customer: SAI Samkruthi PG	Raised By: BDM	<ul style="list-style-type: none"> <li>Update</li> <li>Delete</li> <li>Create Job</li> </ul>
Priority: High	Complaint: Service	
Product/Service: Plastic Pallets	Issue Type: Replacement	
Source:	Status: Assigned	

**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 Job**

Assign To: \*  
 Select Service Center ▼

Status  
 Assigned ▼

Company Or Service Center  
 Service Center ▼

Job Type  
 Repair ▼

Notes: \*

Add Cancel

Service Jobs are managed in the following way.


Date: 13 Dec 2019	Assigned ASC: Tarun Vats	Notes: The parts replacement and delivery to customer site	Case ID: 13748092	Job Type: Repair	Status: Assigned
Date: 17 Oct 2019	Assigned ASC: Tarun Vats	Notes:	Case ID: 67245308	Job Type: Repair	Status: In Progress

Update  
 Delete  
 View  
 +Schedule Service Visit  
 +Add Service Record  
 +Add Job Activity

Entries 1 - 2 of 2

- 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.

 **Service Visit Schedule**

---

<b>Product:</b> *	<input type="text" value="Select"/>	<b>Customer</b>	<input type="text"/>
<b>Visit Time</b>	<input type="text"/>	<b>Type</b>	<input type="text" value="On Site"/>
<b>Person</b>	<input type="text"/>	<b>Date:</b>	<input type="text"/>
<b>Complaint Via:</b>	<input type="text"/>	<b>Priority:</b>	<input type="text" value="Choose a Priority"/>

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

 **Service Visit Record**

---

<b>Service Item:</b> *	<input type="text" value="Select"/>	<b>Repair Stage</b>	<input type="text"/>
<b>Repair Details</b>	<input type="text"/>	<b>Spare Parts</b>	<input type="text"/>
<b>Spare Qty</b>	<input type="text"/>	<b>Date:</b>	<input type="text"/>
<b>Material Cost:</b>	<input type="text"/>	<b>Labour Cost:</b>	<input type="text"/>
<b>Repair Code</b>	<input type="text"/>		

- 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.

**+ Request Spare Parts**

Store Location: \*  From Location: \*

Date: \*  Reference:

Memo:

[+ Add Item](#)

Item Code	Description	Quantity	Batch No	Delete
<input type="text" value="018"/>	<input type="text" value="USB Drives"/>	<input type="text" value="1"/>	<input type="text"/>	
<input type="text" value="019"/>	<input type="text" value="Hard Disks"/>	<input type="text" value="1"/>	<input type="text"/>	

[Add](#) [Cancel](#)

- 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