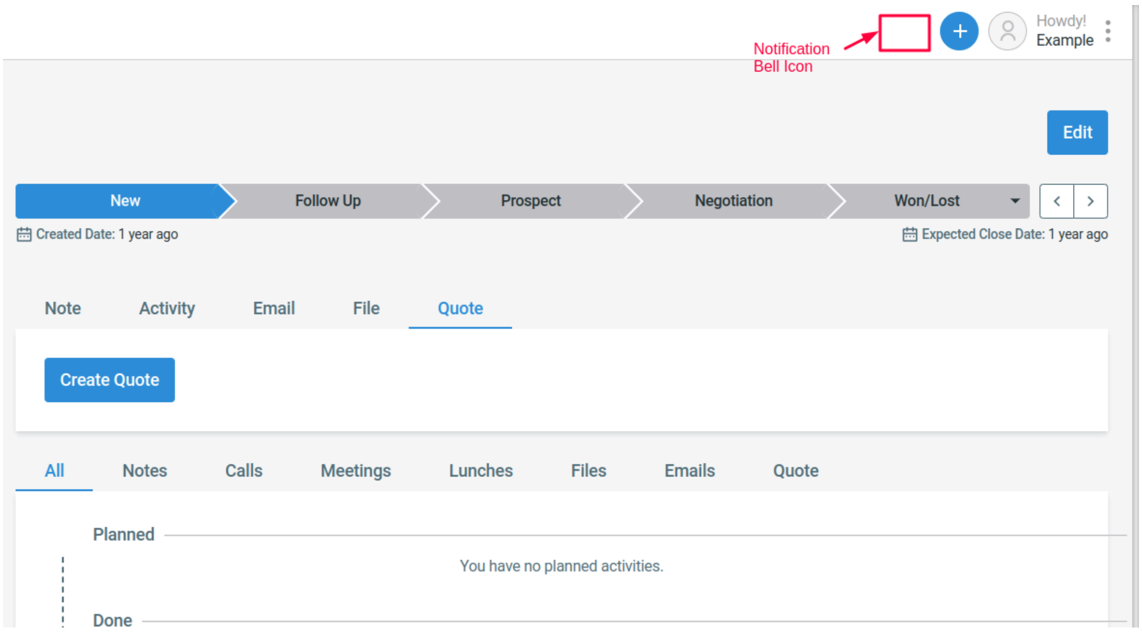
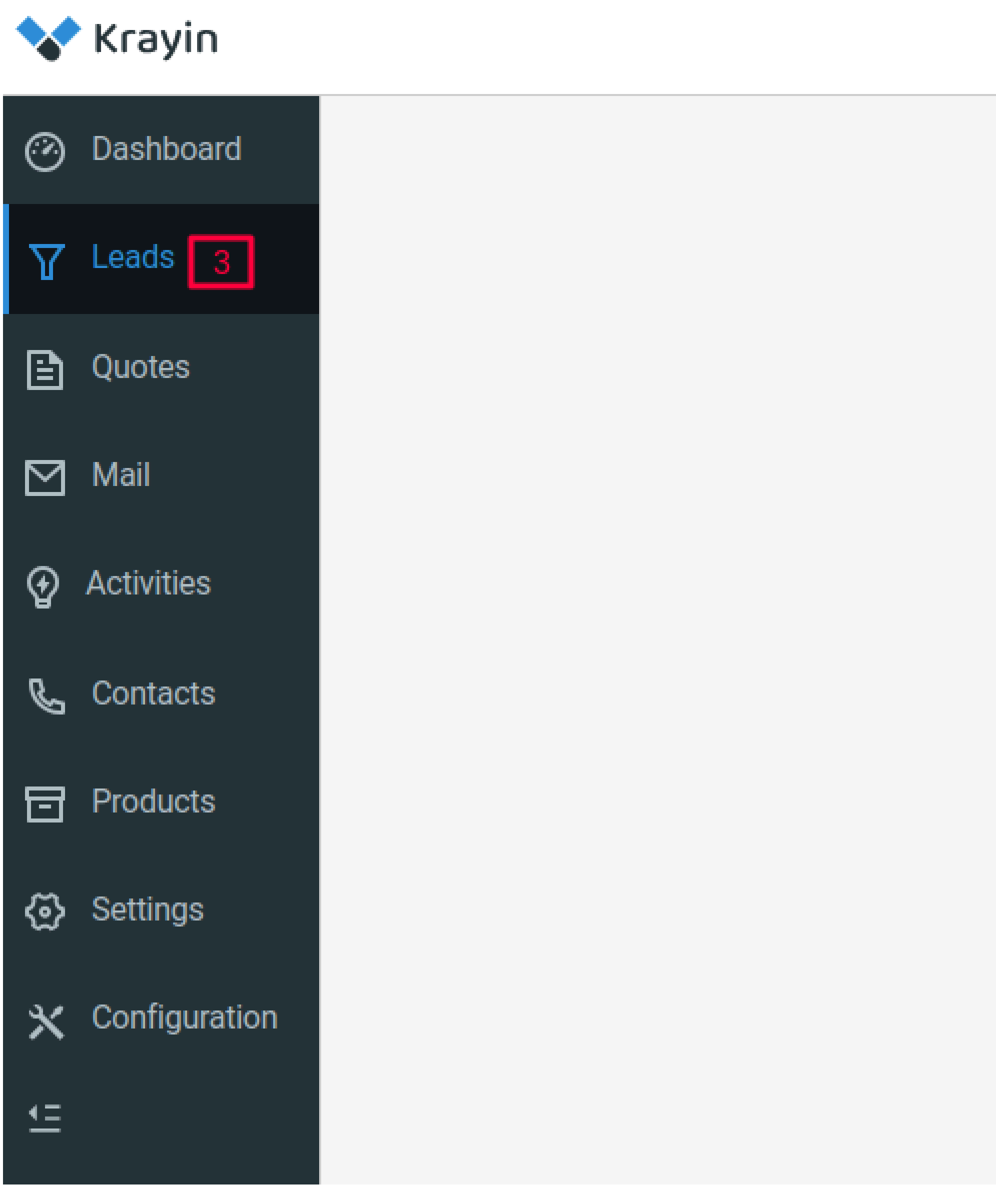
Krayin CRM Customization

Point -1 - Notification

For all the leads that are generated via web form, a notification will be received by the Admin on the Admin dashboard under the bell icon.



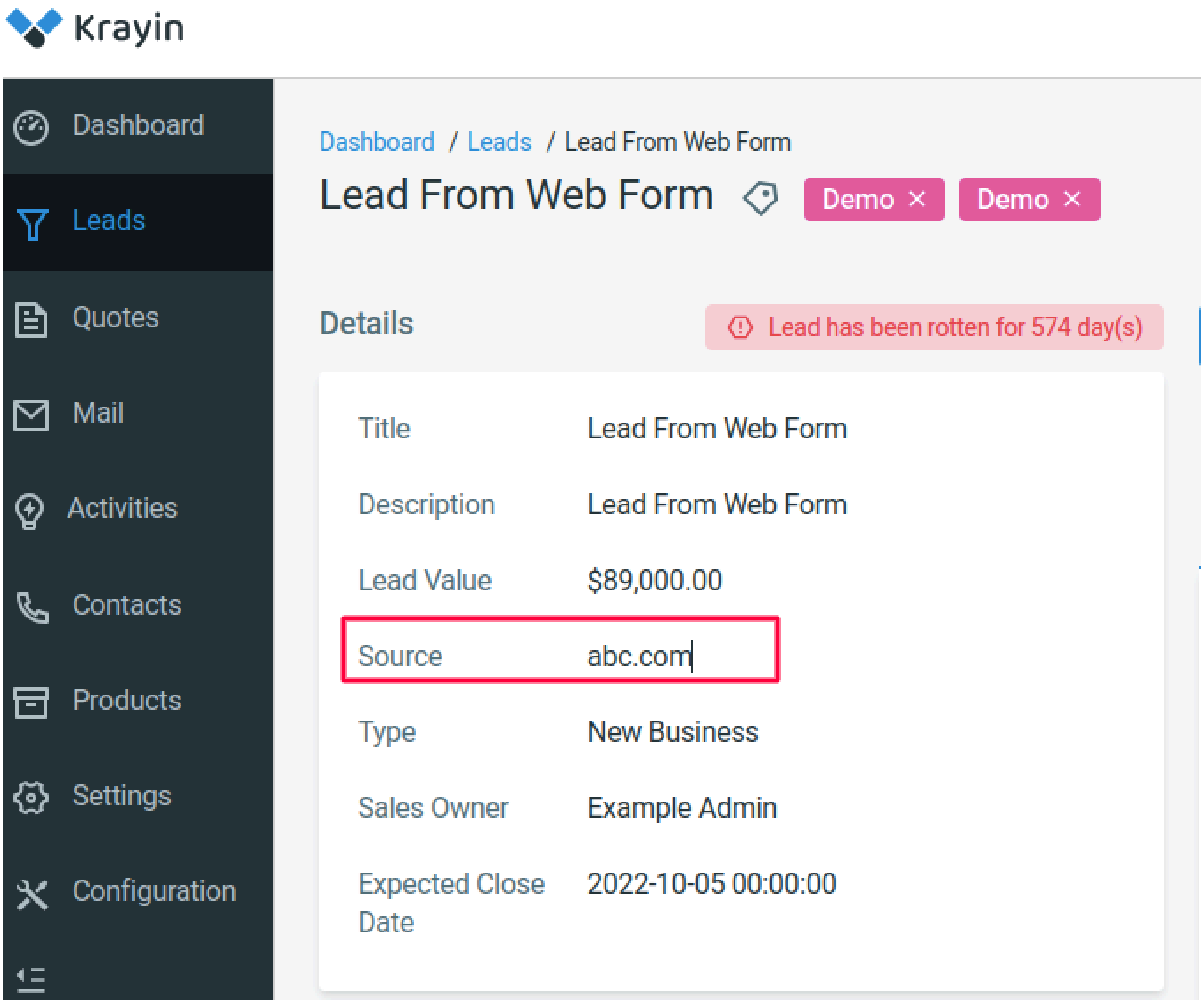
Also, on the "Lead" icon, the total count of unread leads will be displayed in red.



Point -2 - Source Field

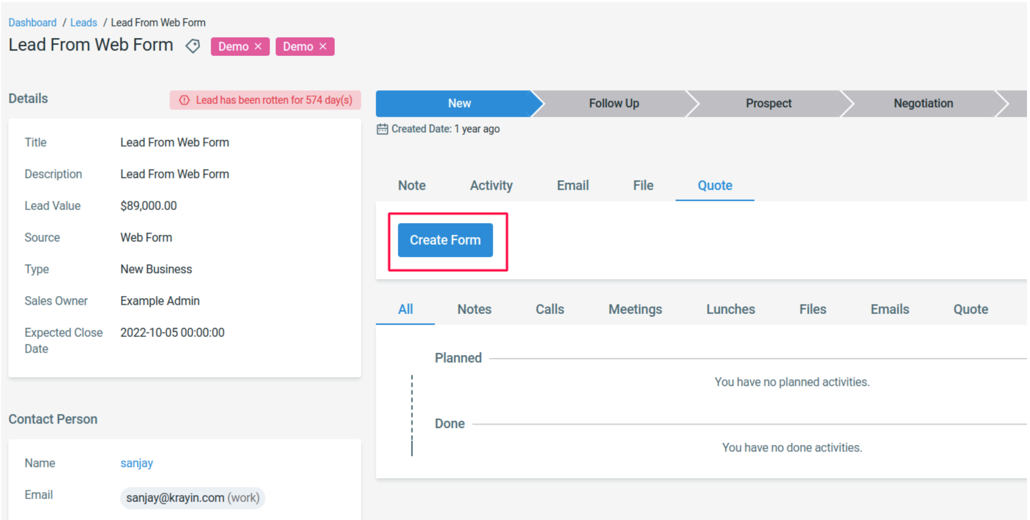
For the lead generated via Web forms, there is a "Source" field already available in the CRM that provides the source information like - Web, Email, Direct, etc.

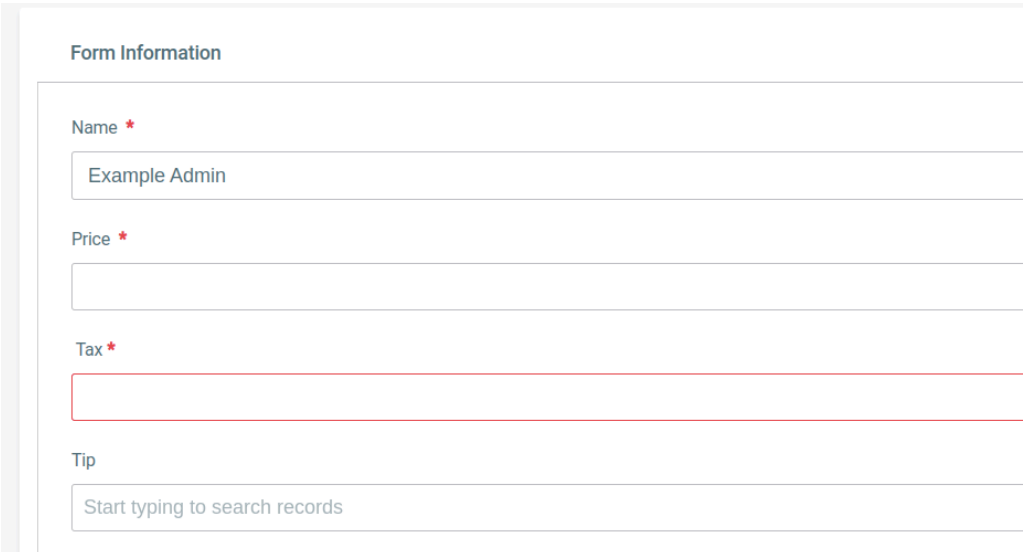
We can customize that for you to provide the website Name and URL in the source field from which the lead is generated.



Point -3 - Send Quote Invoice button

Under the "Lead", a form will be provided with the following fields - Name, Price, Tax, and Tip.





For this form, the admin will be provided with 2 buttons - Send Quote and Send Invoice.

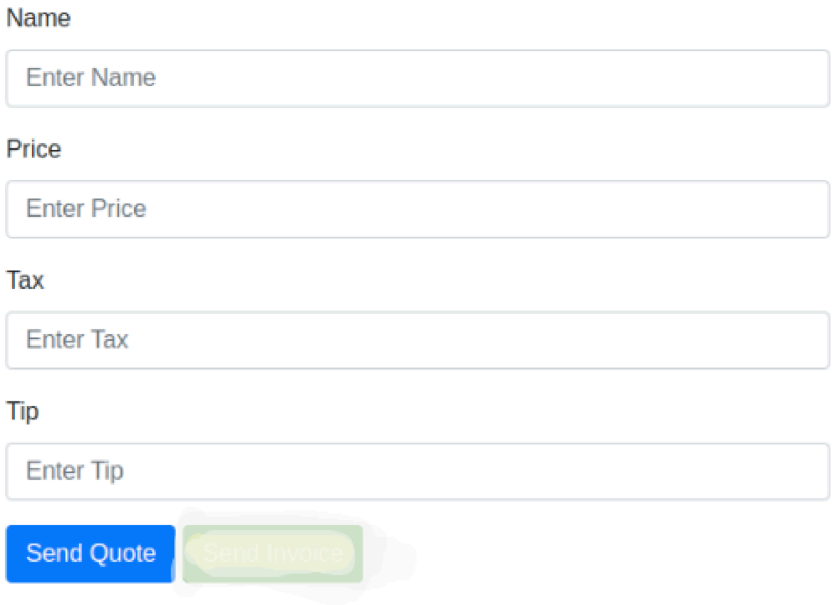
Send Quote -

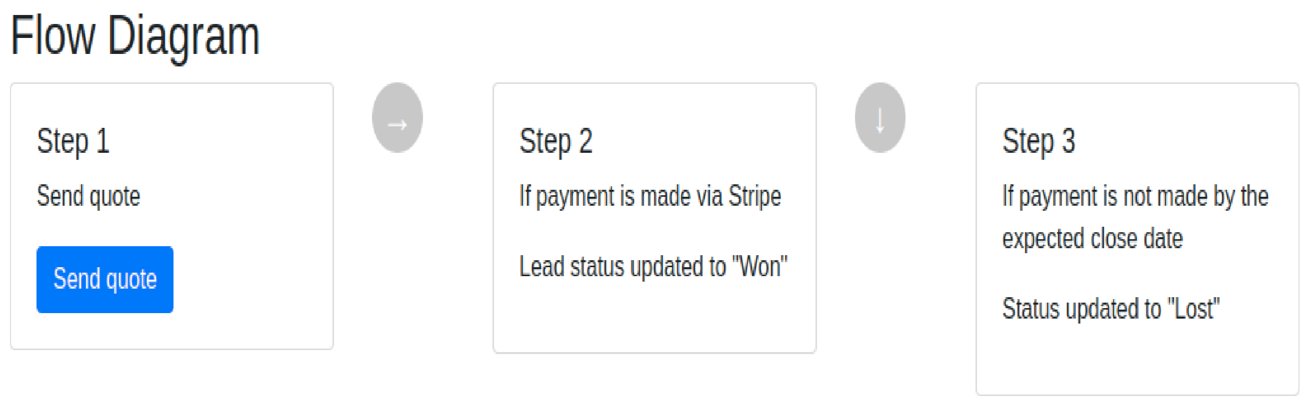
On tapping this button, the quote will be sent to the client on his email ID along with the payment link.

We will integrate the Stripe payment method for the payments.

Once the payment is received, the lead status will be updated to "Won".

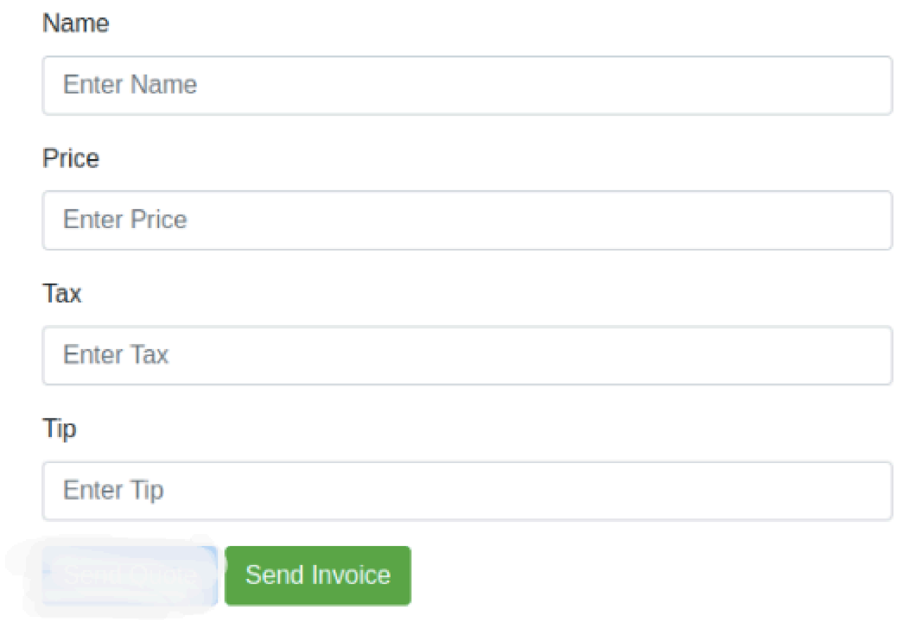
If the payment is not done by the expected close date, the lead status will automatically be changed to "Lost".





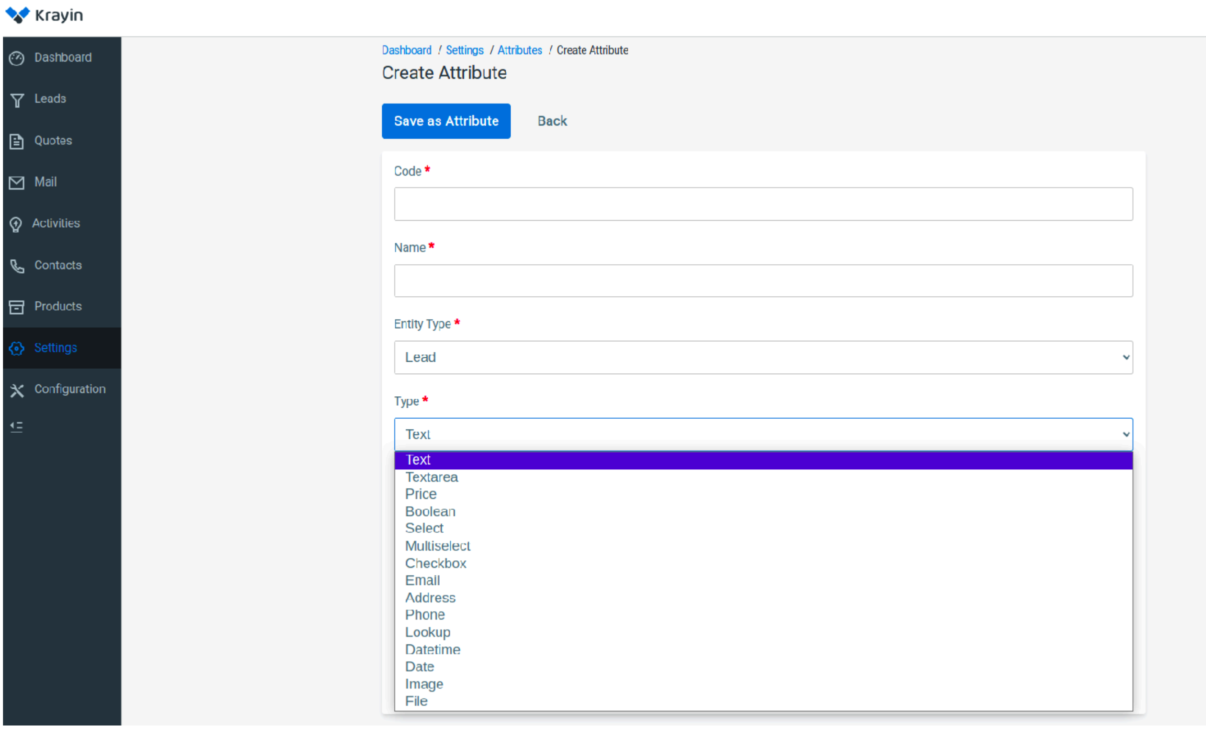
Send Invoice -

Once the payment is done and received, the Admin can tap this button to send the Invoice to the customer via email.



Contact Person Form

By default, the following field types are available for the attributes that can be created for the Person form -



Apart from these fields, you also want to have “Time” and “Number” fields that we can add as a part of customization.

Further, these created attributes will be available for the Contact person form and web forms.

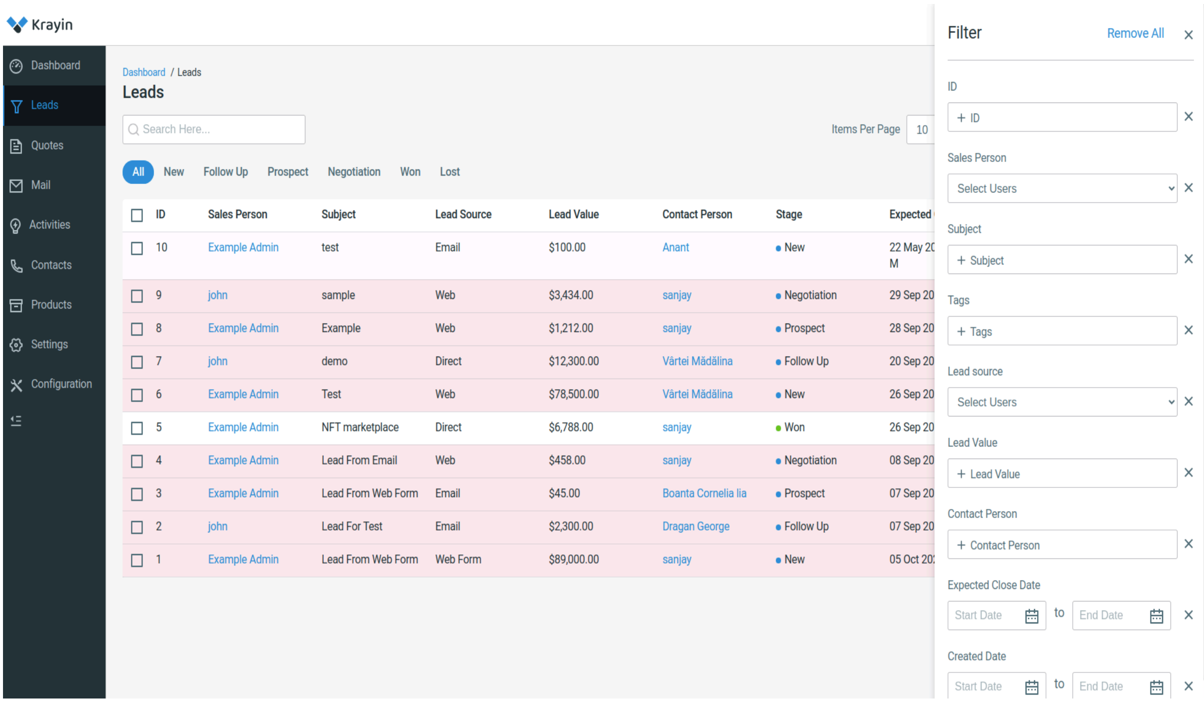
Web Form

As of now, In the web form, you can create the field Types as follows -

- Select
- Date
- Time
- Text
- Number
- Text Area

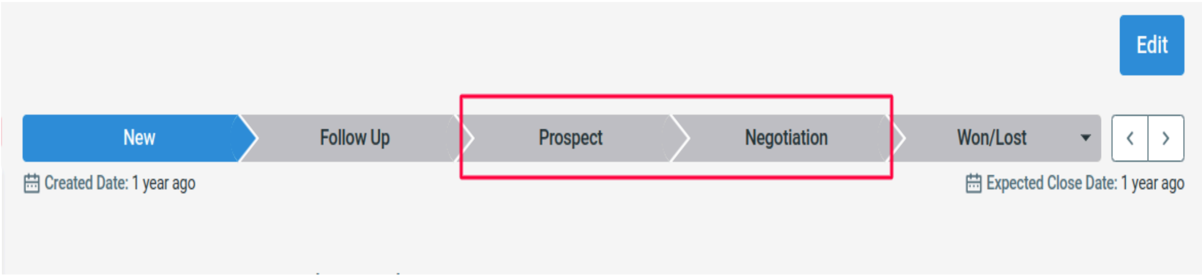
Lead Filter

The leads can be sorted based on the "Pickup Date" and "Pickup Time" via filter.



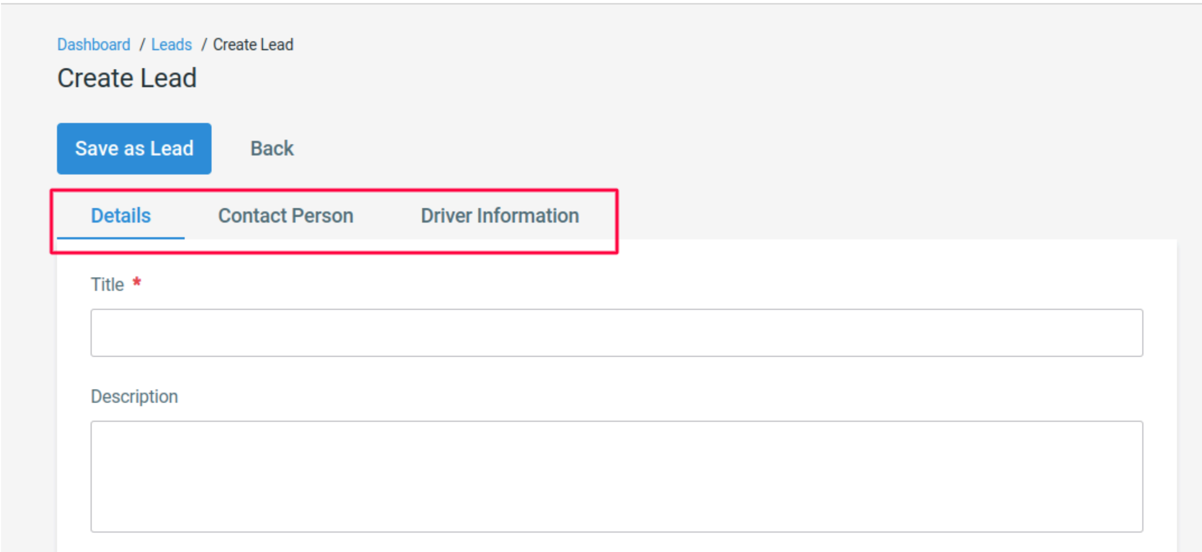
Lead Status

As discussed, we will remove the “Prospect” and “Negotiation” status of the lead.

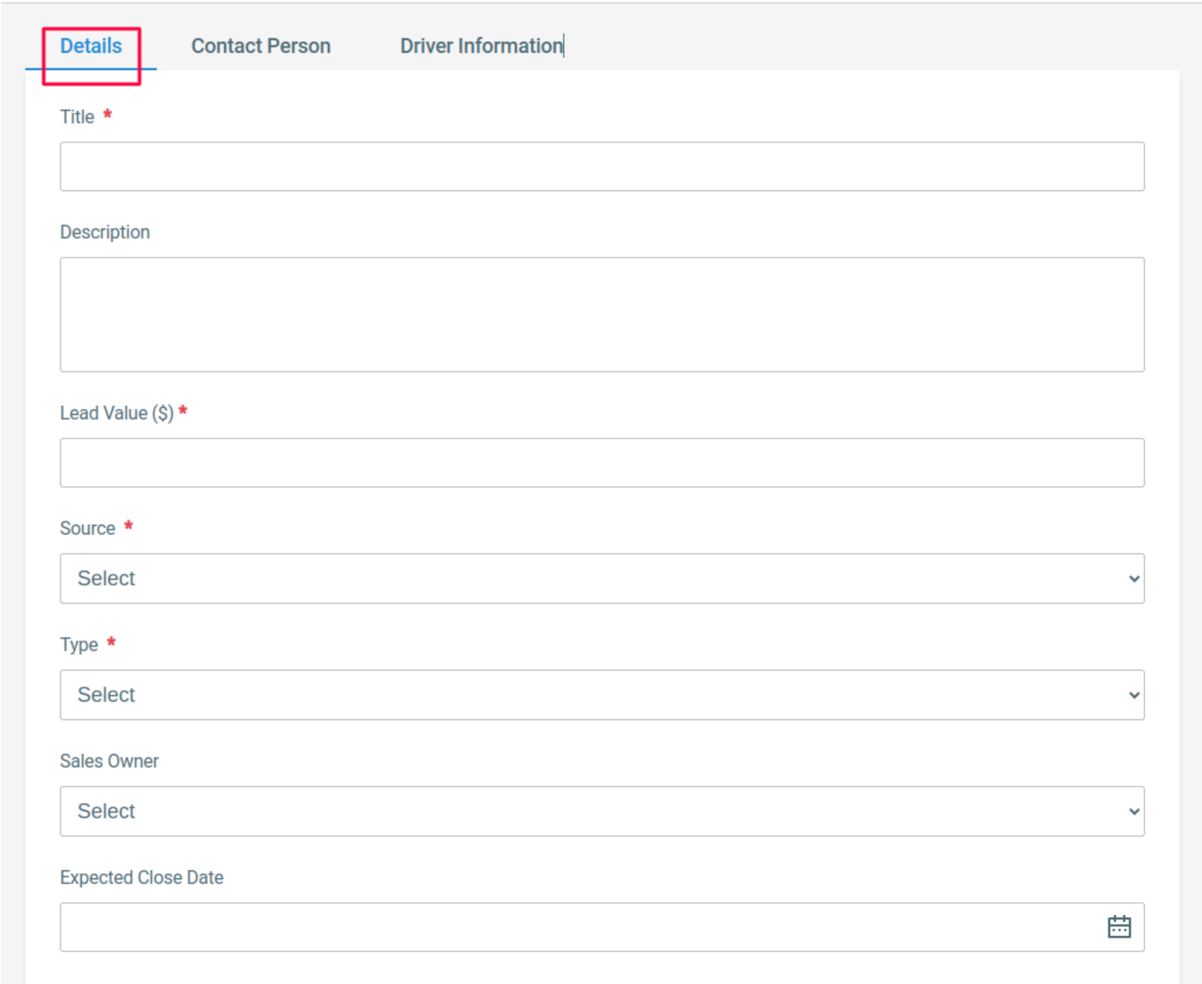


Leads

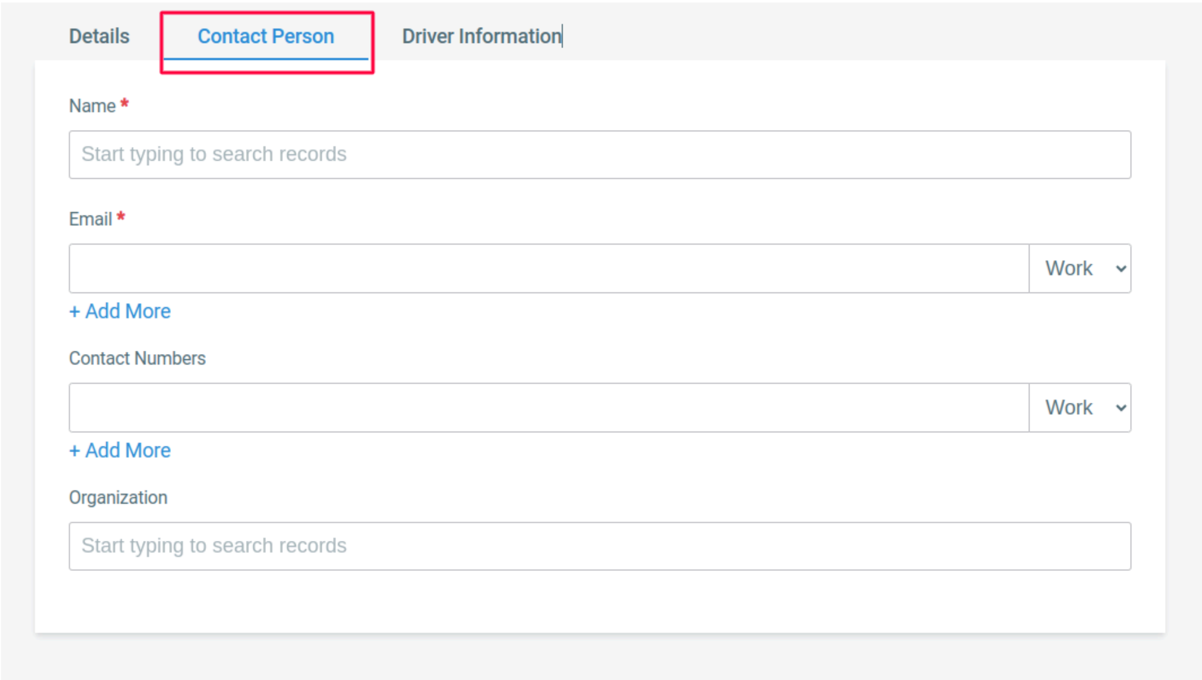
While creating the lead, you need to fill in three different sections - Details, Contact Person, and Driver Information.



The “Details” section will contain the below-mentioned information -



The “Contact Person” section will contain all the fields related information -

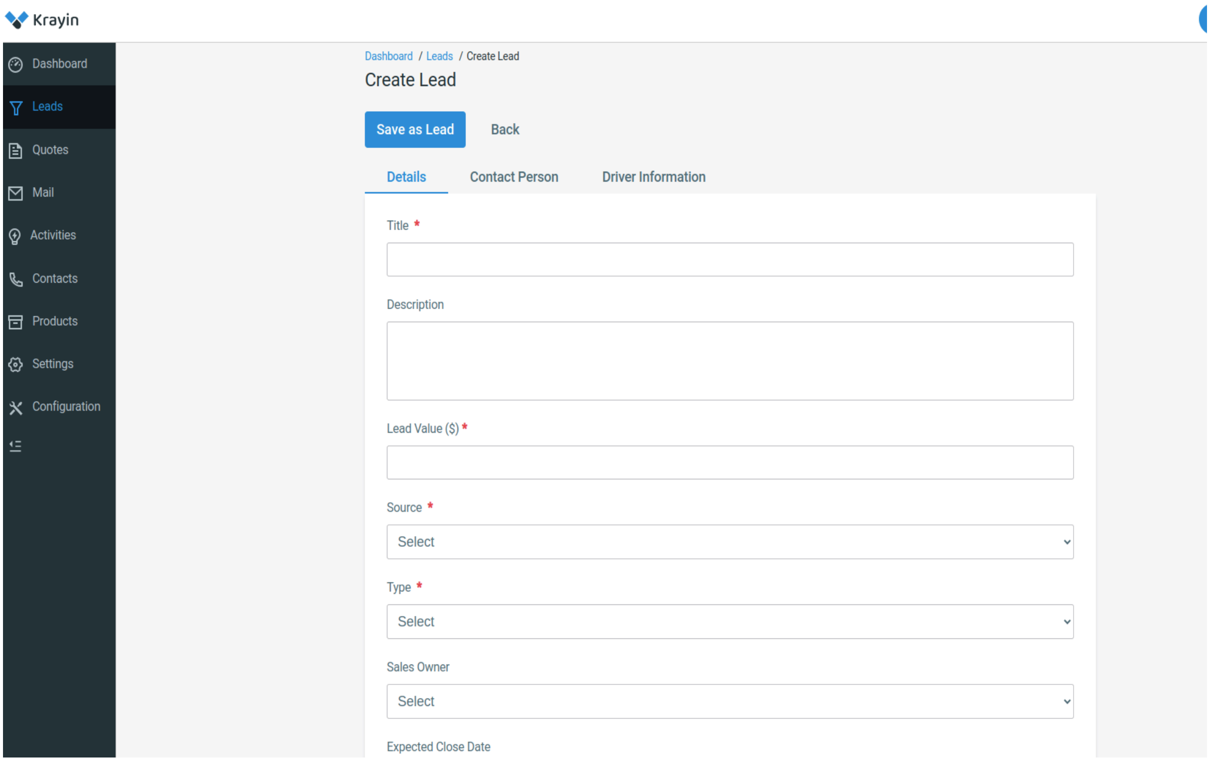


All the fields suggested by you will come under the “Contact Person” form.

- **Lead Fields Front End & Backend**
  - **Service Type** (Select)
    - One Way Trip To Airport
    - One Way Trip From Airport
    - Round Trip To Airport
    - Round Trip From Airport
    - One Way Trip Point To Point
    - Round Trip Point To Point
    - Hourly Service
  - **Vehicle Type** (Select)
  - **Pickup Date** (Date Picker)
  - **Pickup Time** (Time Picker)
  - **Pickup Location** (Text)
  - **Dropoff Location** (Text)
  - **Pickup Airport (**Only for One Way Trip From Airport**)** (Text)
  - **Dropoff Airport (**Only for One Way Trip to Airport**)** (Text)

Driver Information

At the CRM end, we can remove the “Product” section and provide you with the “Driver Information” section.



Under this driver information, we can provide you with all the additional fields.

- **Driver Name**
- **Driver Phone**
- **Cost**
- **Tax**
- **Gratuity**
- **Extra Addons**
- **Total Cost**
- **Source of Lead**