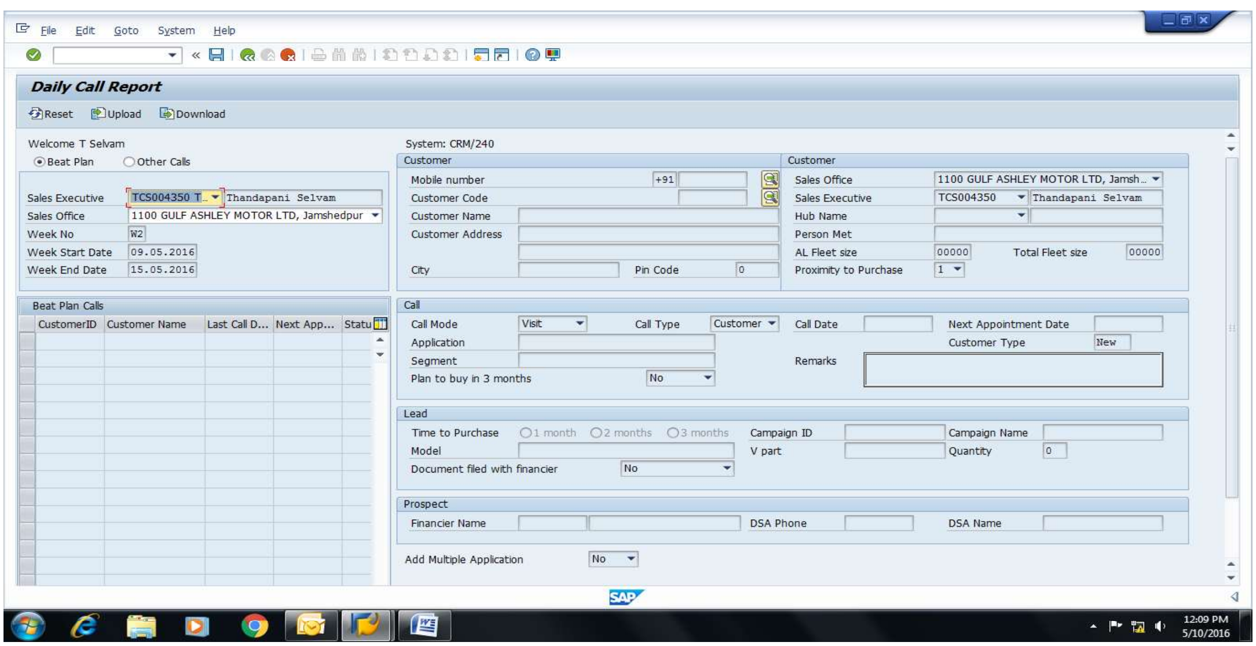
Customer Relationship Management

User Manual for DCR Screen

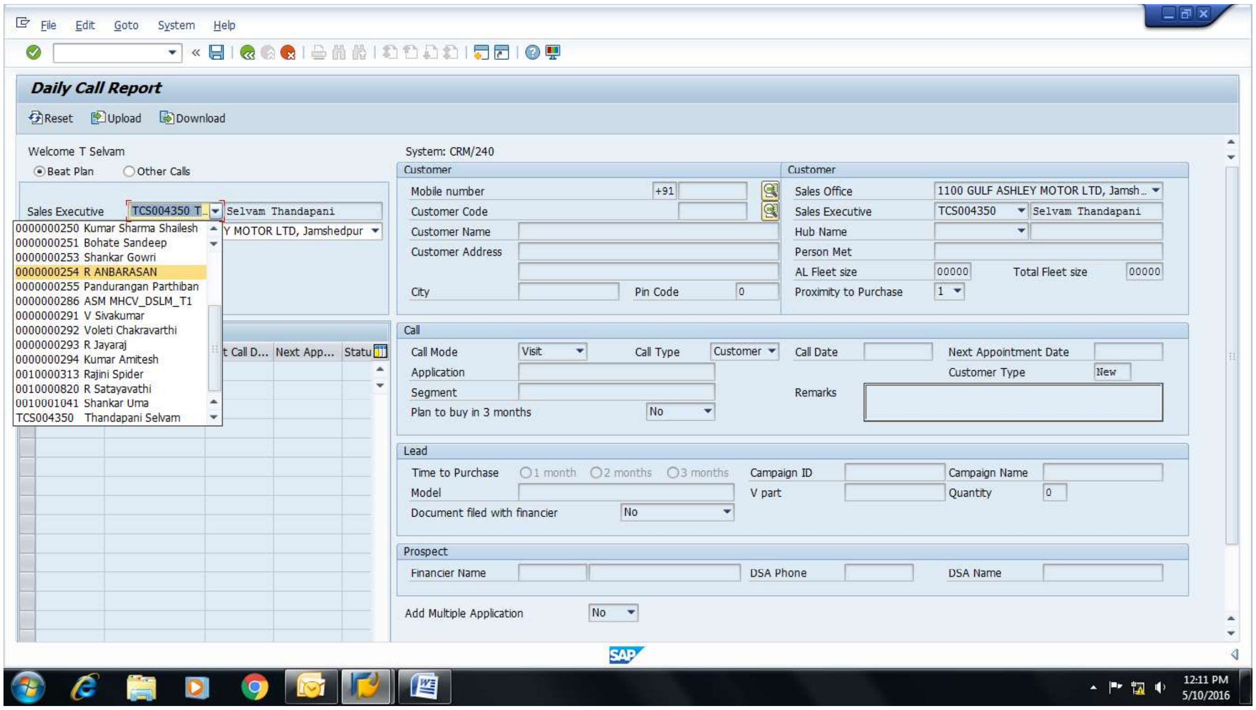
DCR SCREEN – BEAT PLAN:

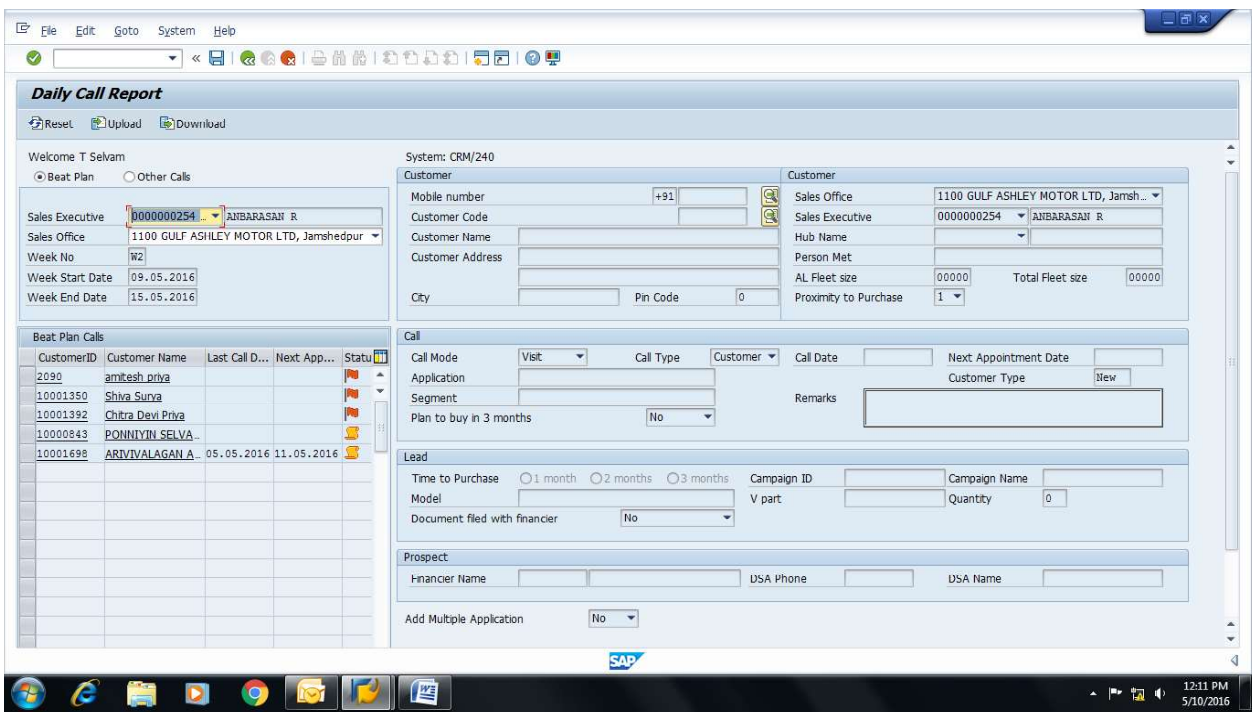
a) Use T-Code ZCRM_DCR to navigate to the screen.

b) As soon as you execute the T-code you get to see welcome note with Login user's name and two radio buttons with Beat Plan and Other calls. Beat Plan is selected automatically by default. In Sales Executive field, login id user name should get populated with his name and sales office.

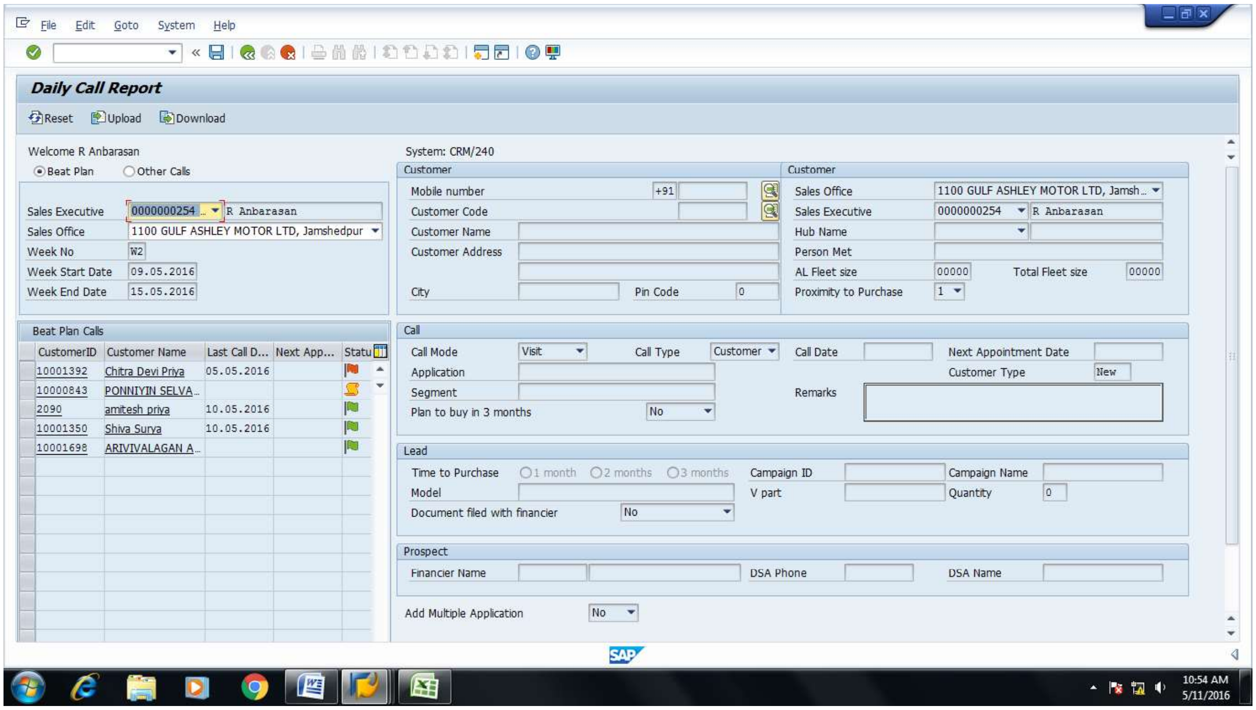


c) If the login user is a manager, he can select a sales executive from the drop down and see the beat plan of him.



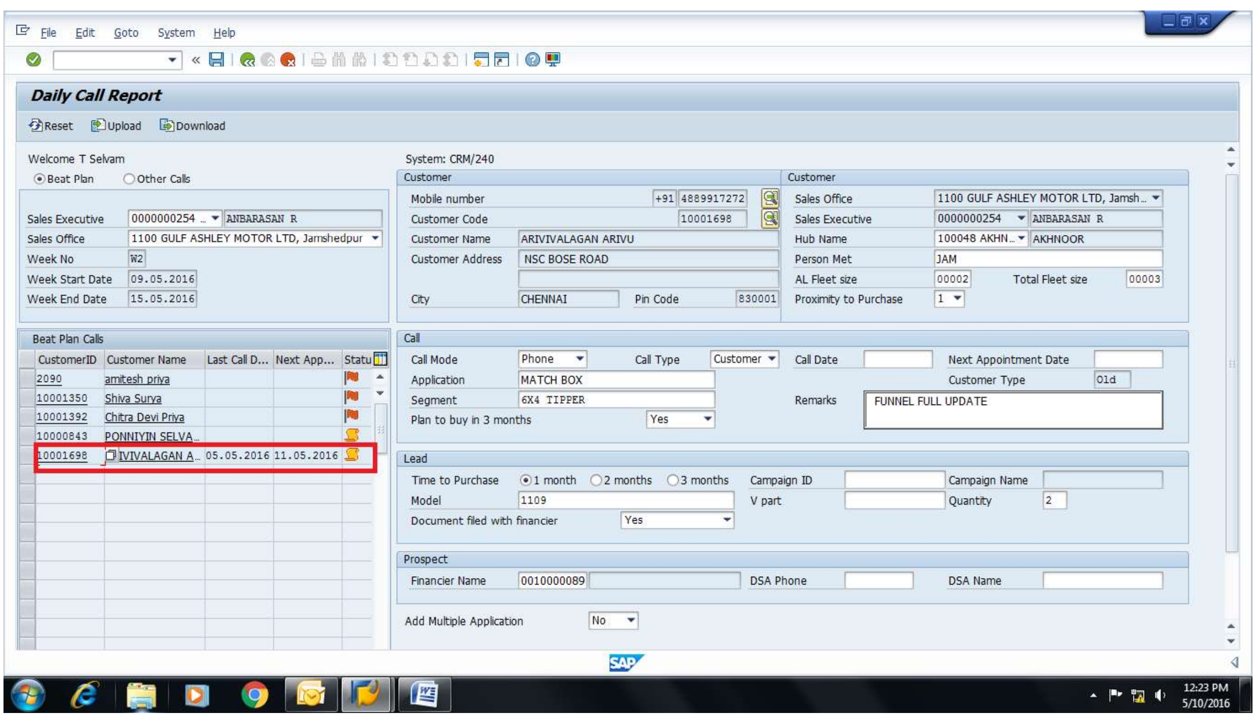


d) If the login user is an executive, he can view his beat plan set by his manager right after opening the screen.



In the above screen, you can see the name in the Welcome note and Sales executive are same.

e) To view the DCR of the beat plan customer click on any of the customer's ID or Customer's name. The recent DCR of the customer gets displayed.



f) The color of the flag indicates:

a.a.i. Red – Beat Plan

a.a.ii. Yellow – Follow-up customer

a.a.iii. Green – Finished Follow up.

In the customer tab, editable fields are Hub name, Person met, AL fleet size, Total fleet size and Proximity to Purchase. These can be changed for any customer if required.

a) **Task Creation**: To create Task for this customer use Call Tab. The list of fields displayed are:

1.a.i. Call Mode – Select from the drop down (Mandatory)

1.a.ii. Call Type – Select from the drop down (Mandatory)

1.a.iii. Call date – Select from the Calendar (Mandatory). Call date should be today's date or one month less than today's date.

1.a.iv. Next Appointment Date – Select from the calendar (Not mandatory). This date should be today's date or future date.

1.a.v. Application – Select from the drop down (Mandatory)

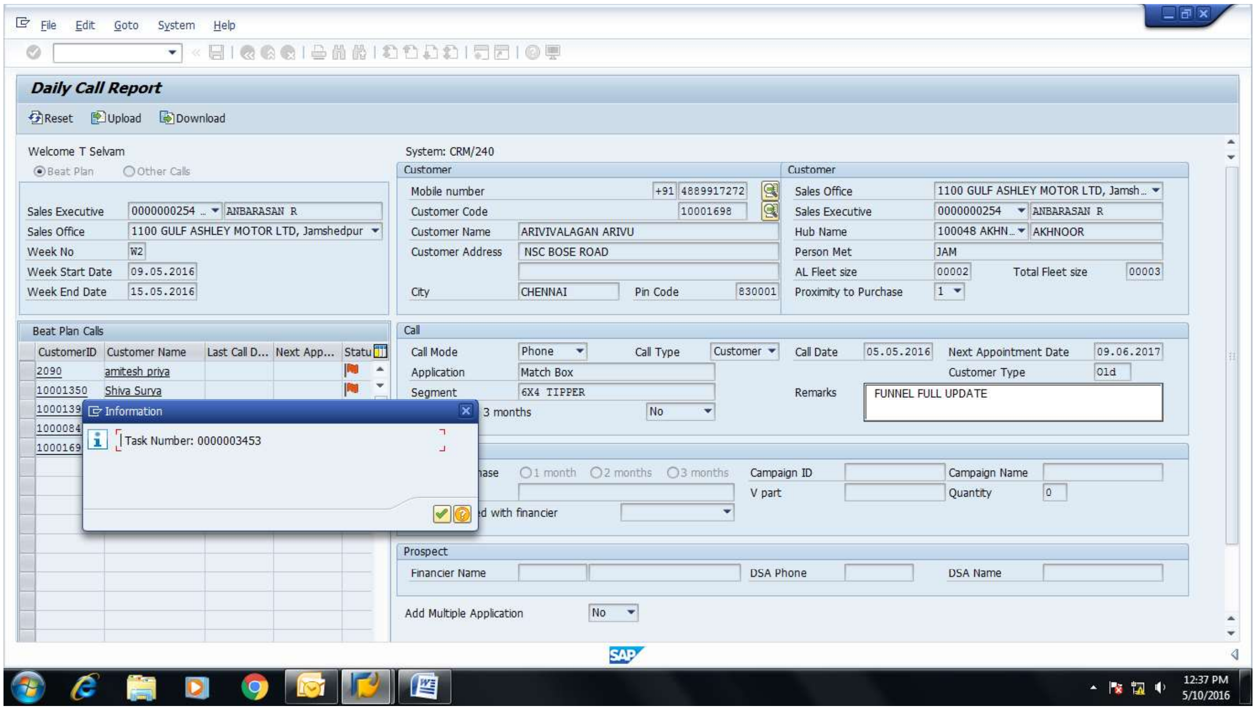
1.a.vi. Segment – Select from the drop down (Mandatory)

1.a.vii. Customer Type- Automatically populated based on old or new customer (Always Grayed out)

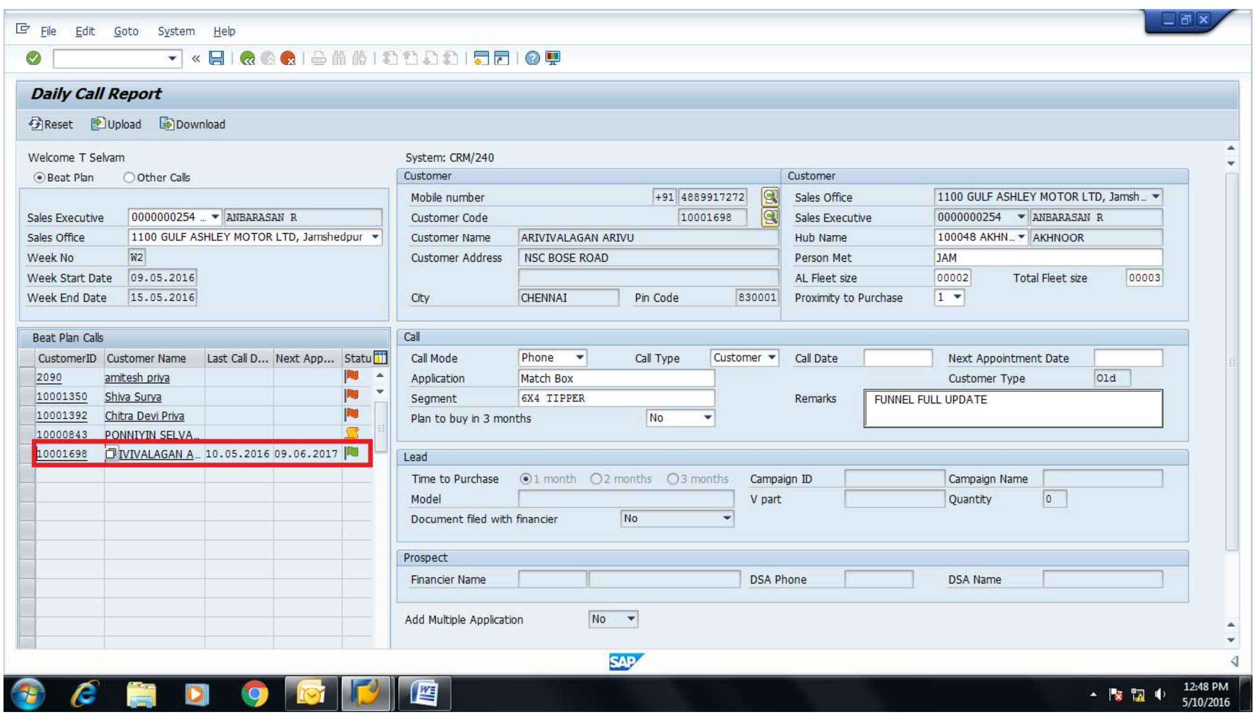
1.a.viii. Remarks – Type any remarks (Mandatory)

1.a.ix. Plan to Buy in 3 months – Select from the drop down. It has two values. Yes and No. If selected "yes" Lead tab gets enabled. If selected "No" only task gets created with a unique number.

After entering all the details click on save button to save the transaction. The task is created.



a) **Create Task and Lead**: To create lead for customer, click on the customer's ID on the left side. The latest DCR data gets displayed.



b) Give all the required fields in "Call" tab and set plan to buy in 3 months as "Yes". The Lead Tab has the following fields:

1.a.i. Time to purchase – Set to 1 month by default. It can be changed according to the requirement.

1.a.ii. Campaign ID – Select from the list. (Not mandatory)

1.a.iii. Campaign Name – Automatically gets populated once the Campaign Id is selected.

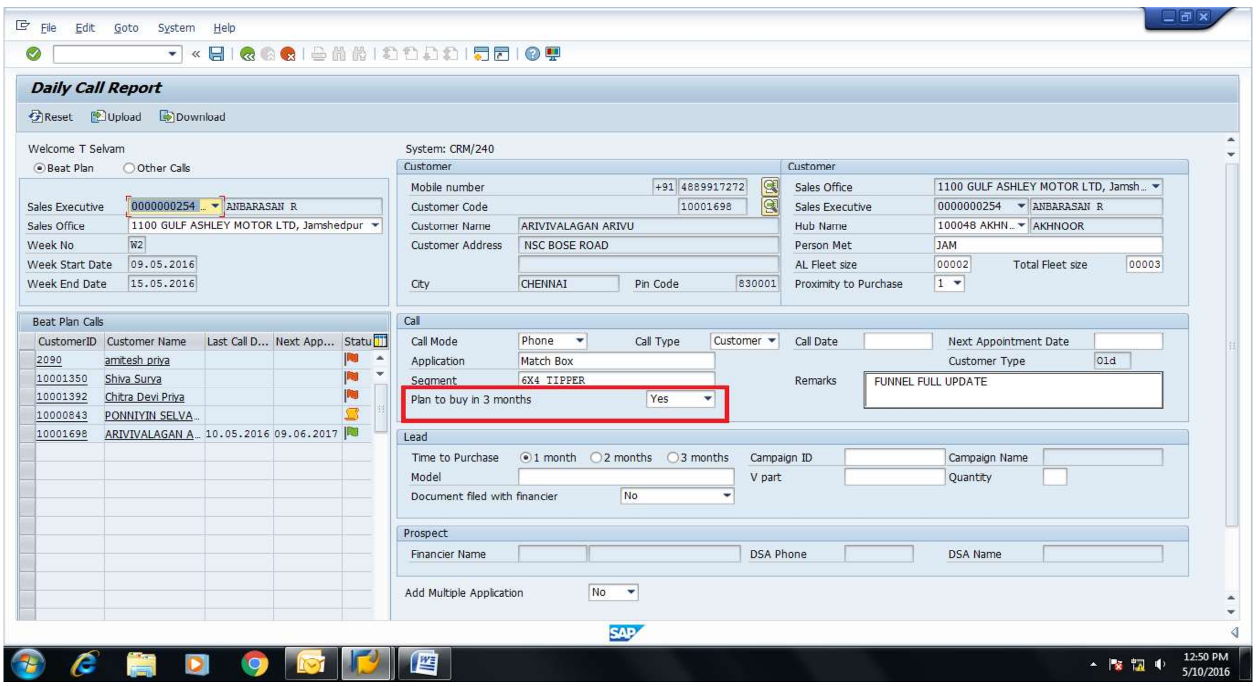
1.a.iv. Model – Select from the list (Mandatory filed)

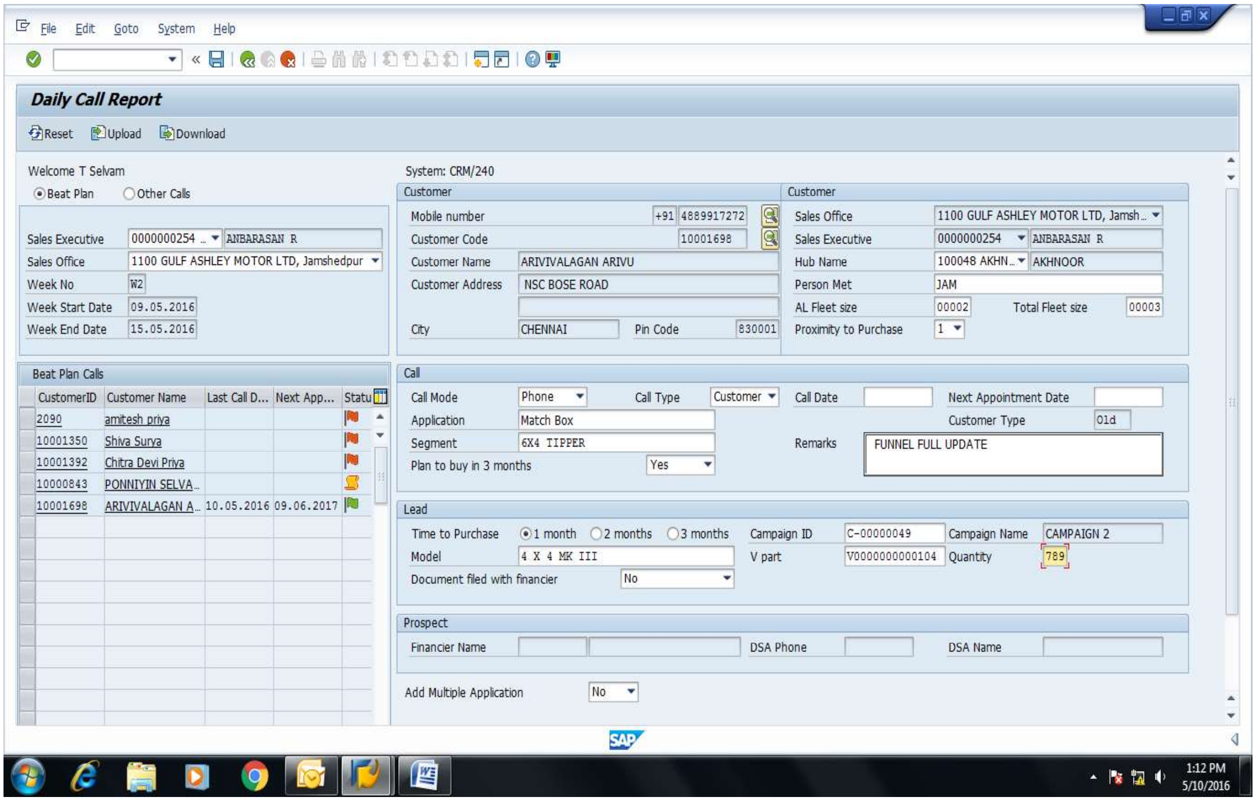
1.a.v. V-part – Select from the list (Not mandatory)

1.a.vi. Quantity – Can give from 1 to 999 (Mandatory)

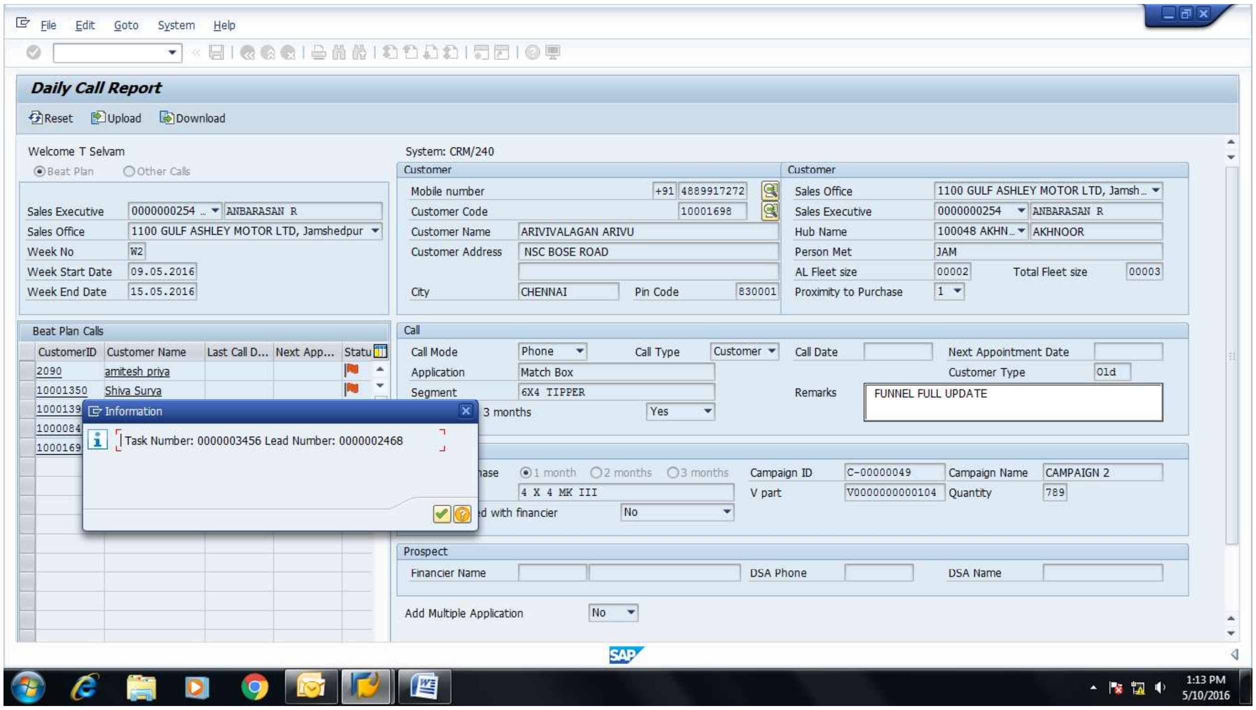
Click on save button to save the transaction.

Note: Task cannot be created if the call date is repeated for the same customer, segment and application combination. So make sure that call date differs for the same DCR data.

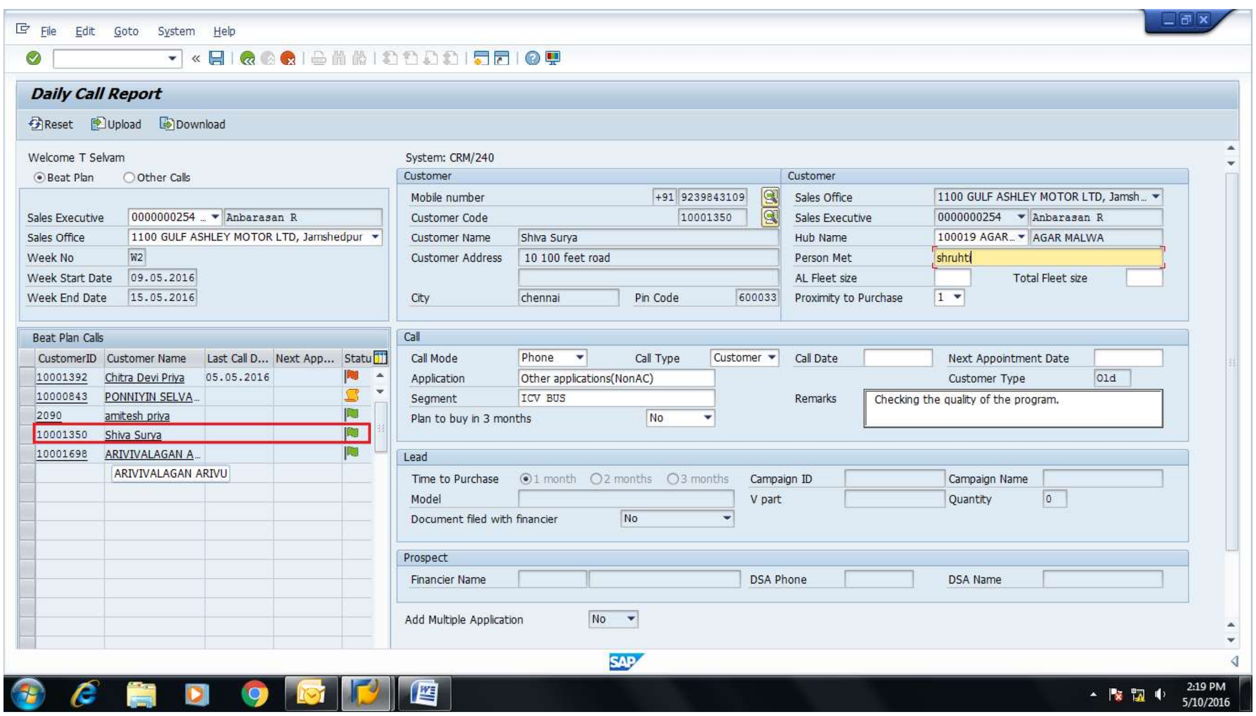




a) After clicking on save, newly created task and Lead numbers gets displayed.



b) **Create Task, Lead and Prospect:** To create prospect click on any of the beat plan customers. Latest DCR of the customer gets displayed.



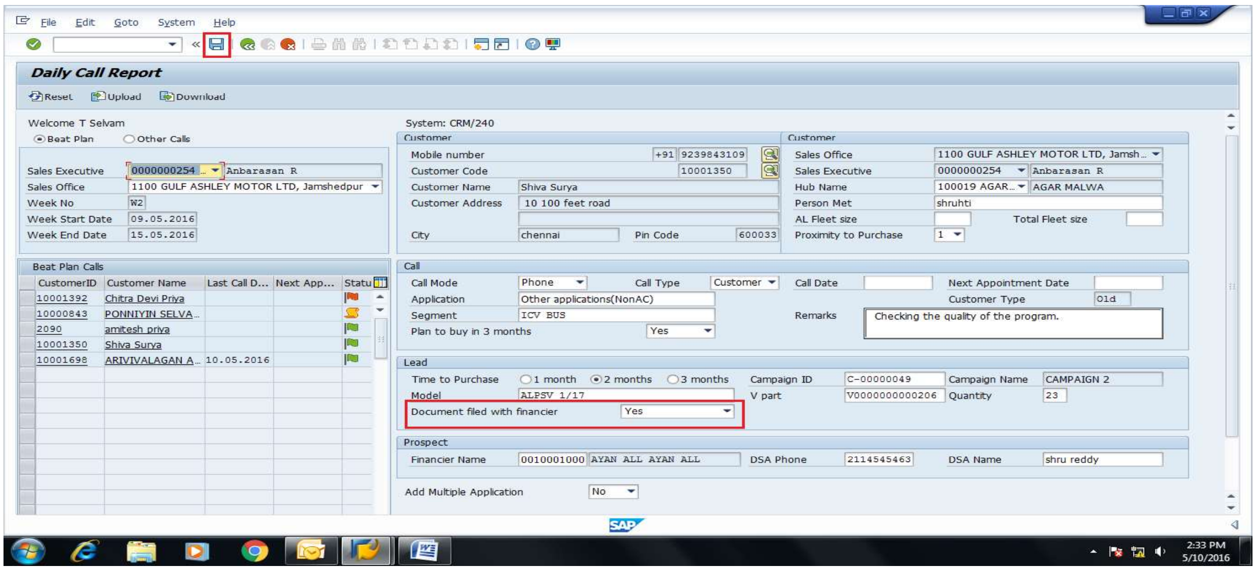
c) Give all the necessary details in Call Tab, set plan to buy in 3 months to “Yes”. Then lead tab gets enabled. Fill all the necessary fields in Lead tab and set Document filed with Financier to "yes". The Prospect tab gets enabled. The following fields get enabled.

1.1.1 Financier Name – Select from the list (Mandatory)

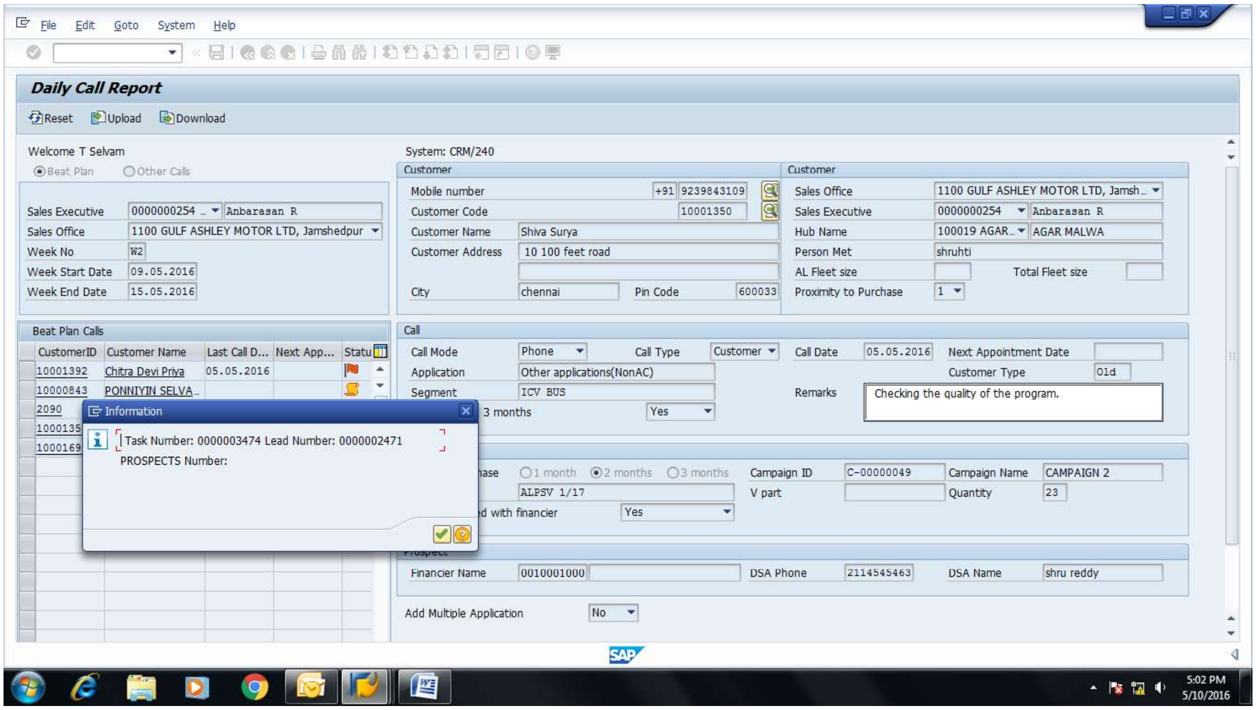
1.1.2 DSA Phone – Enter a valid 10-digit mobile number. (Not mandatory)

1.1.3 DSA Name- Enter any name (Not mandatory)

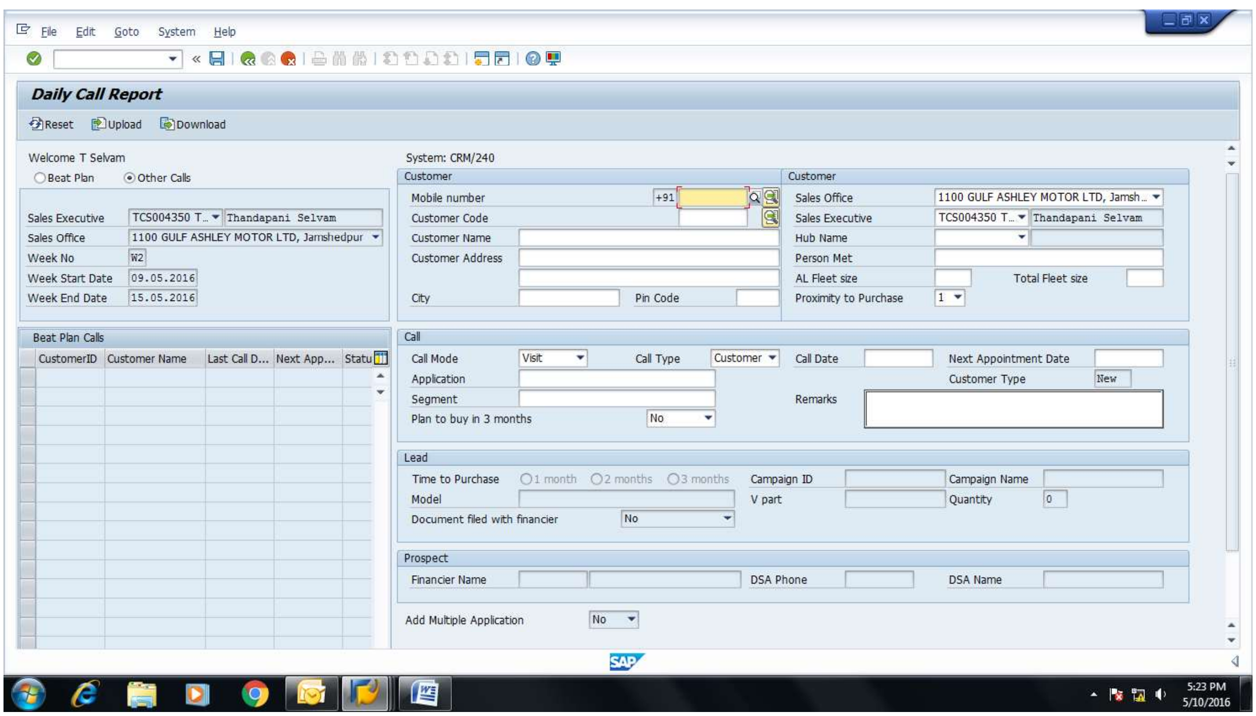
After entering all the details click on Save button.



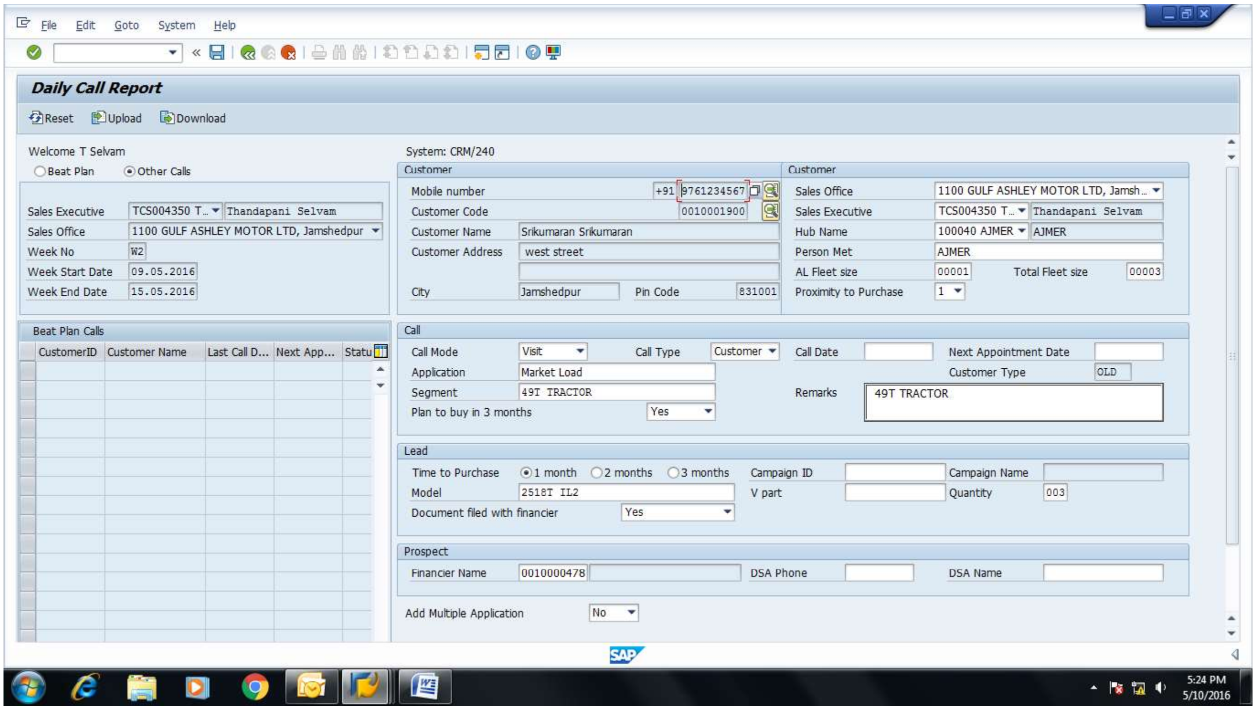
a) After clicking on save, the transaction gets saved with Unique Task, lead and Prospect numbers.



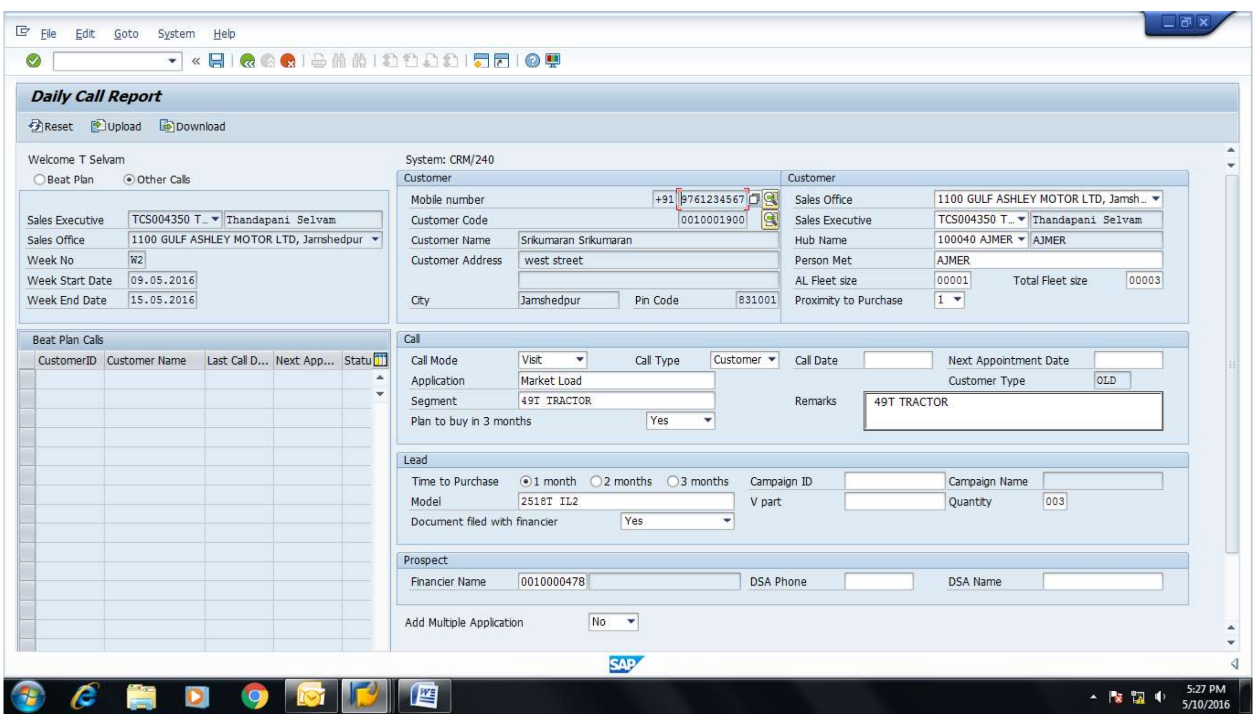
b) **OTHER CALLS – Existing Customer:** In Other Calls, either existing customers can be searched and create a Lead, task, Prospect for him or a new customer can be created and create Task , Lead, Prospect for him.



Note: Customer type in Call tab is set to New by default. If you search for an existing customer it will automatically get changed to “Old”.



c) To search for an existing customer, mobile number or customer code can be given in the respective fields. If the customer with that particular mobile number or customer exists, the DCR data will get populated or you can click directly on search button to see the list of all existing customers.



d) Editable fields in this screen are Sales Office, Sales Executive, Hub Name, Person Met, AL fleet size, Total Fleet Size, Proximity to Purchase. Any changes required can be made and save the data only after giving Task details. Customer alone cannot be saved. Sales office, Sales executive, hub name and Proximity to Purchase are mandatory fields.

Note: AL fleet size should always be less than or equal to Total Fleet Size.

e) **Task Creation**: To create Task for this customer use Call Tab. The list of fields displayed are:

1.a.i) Call Mode – Select from the drop down (Mandatory)

1.a.ii) Call Type – Select from the drop down (Mandatory)

1.a.iii) Call date – Select from the Calendar (Mandatory). Call date should be today's date or one month less than today's date.

1.a.iv) Next Appointment Date – Select from the calendar (Not mandatory). This date should be today's date or future date.

1.a.v) Application – Select from the drop down (Mandatory)

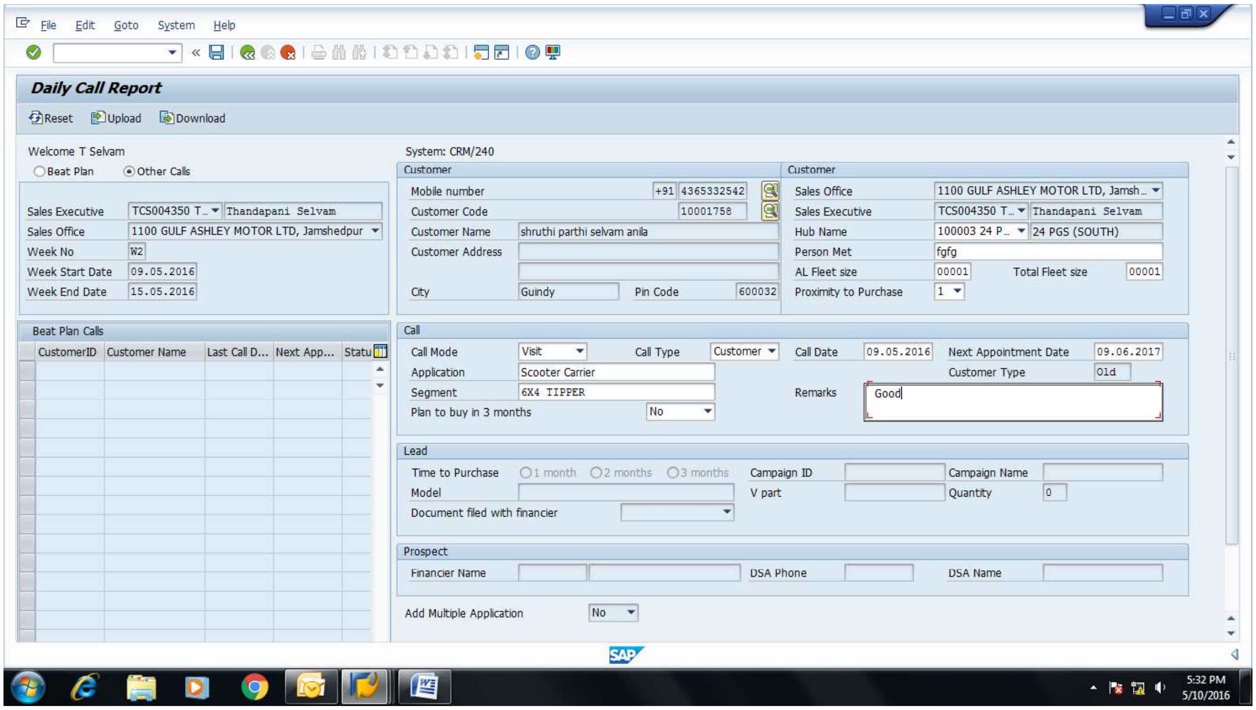
1.a.vi) Segment – Select from the drop down (Mandatory)

1.a.vii) Customer Type- Automatically populated based on old or new customer (Always Grayed out)

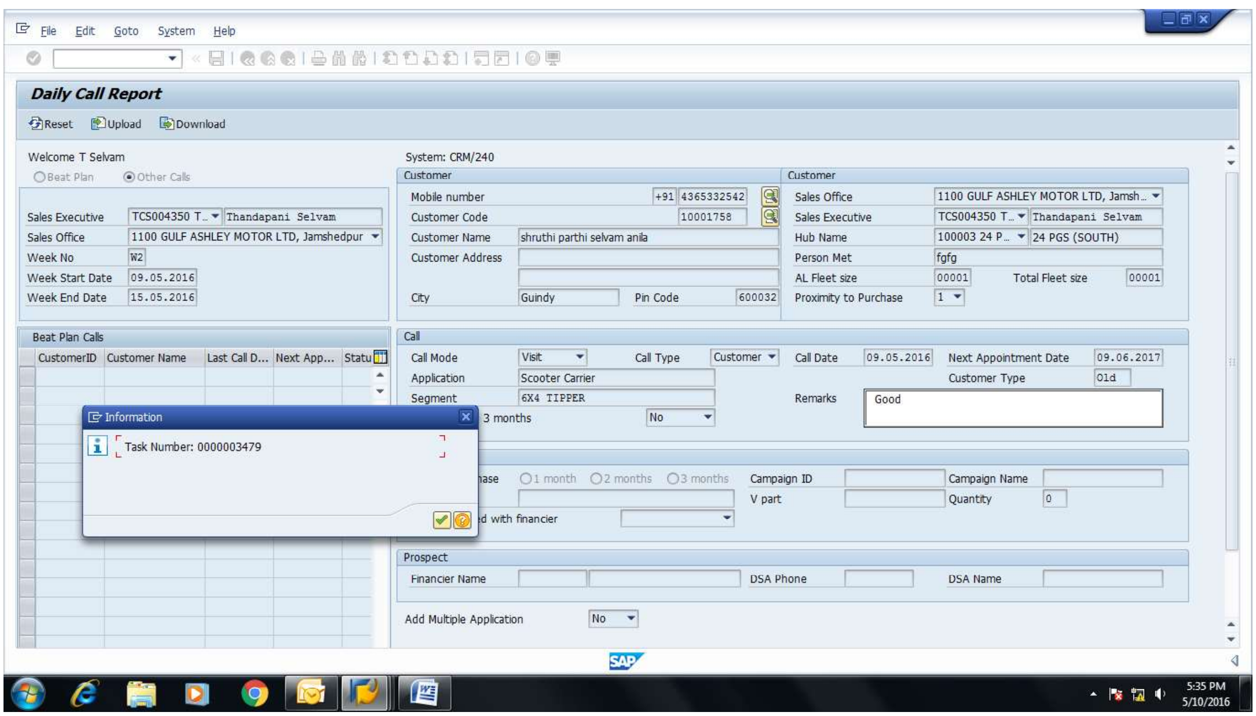
1.a.viii)Remarks – Type any remarks (Mandatory)

1.a.x.Plan to Buy in 3 months – Select from the drop down. It has two values. Yes and No. If selected "yes" Lead tab gets enabled. If selected "No" only task gets created with a unique number.

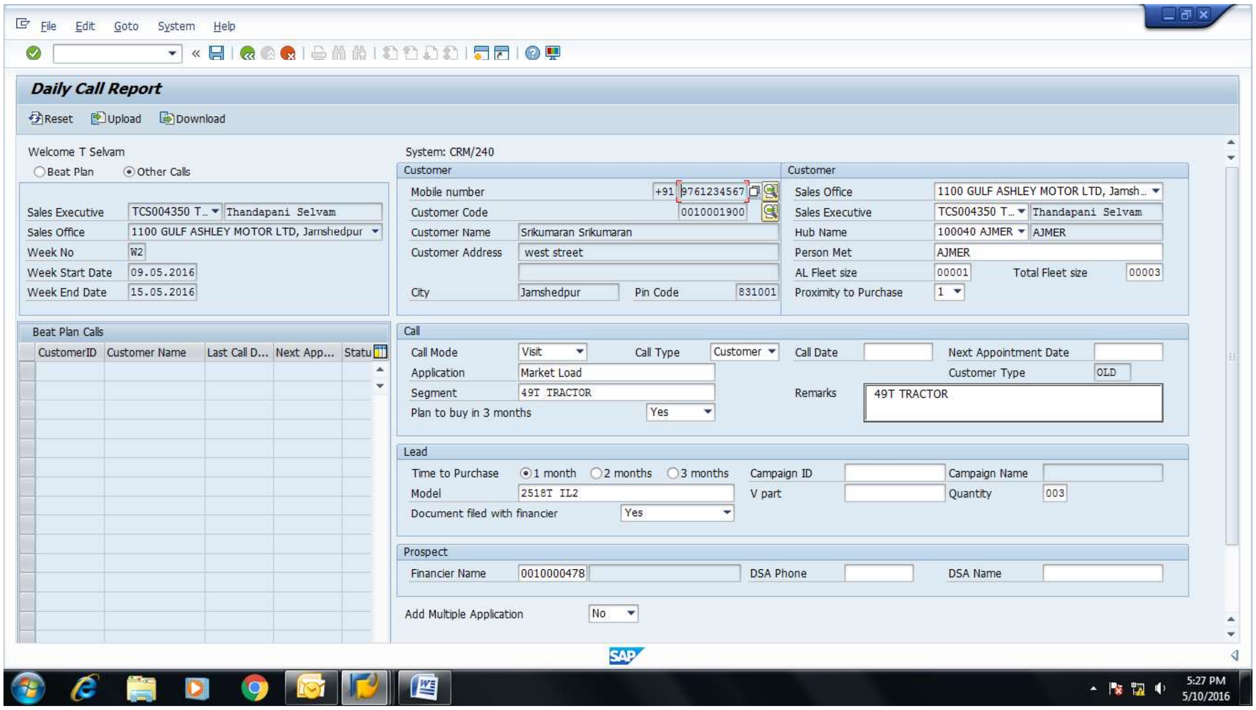
After entering all the details click on save button to save the transaction. The task is created.



a) The task is created with a unique number.



b) **Creating Task and Lead for the existing Other calls customers:** To search for an existing customer, mobile number or customer code can be given in the respective fields. If the customer with that particular mobile number or customer exists, the DCR data will get populated or you can click directly on search button to see the list of all existing customers.



Editable fields in this screen are Sales Office, Sales Executive, Hub Name, Person Met, AL fleet size, Total Fleet Size, Proximity to Purchase. Any changes required can be made and save the data only after giving Task details. Customer alone cannot be saved. Sales office, Sales executive, hub name and Proximity to Purchase are mandatory fields.

Note: AL fleet size should always be less than or equal to Total Fleet Size.

Task Creation: To create Task for this customer use Call Tab. The list of fields displayed are:

(1.a.i.1)Call Mode – Select from the drop down (Mandatory)

(1.a.i.2)Call Type – Select from the drop down (Mandatory)

(1.a.i.3)Call date – Select from the Calendar (Mandatory). Call date should be today's date or one month less than today's date.

(1.a.i.4)Next Appointment Date – Select from the calendar (Not mandatory). This date should be today's date or future date.

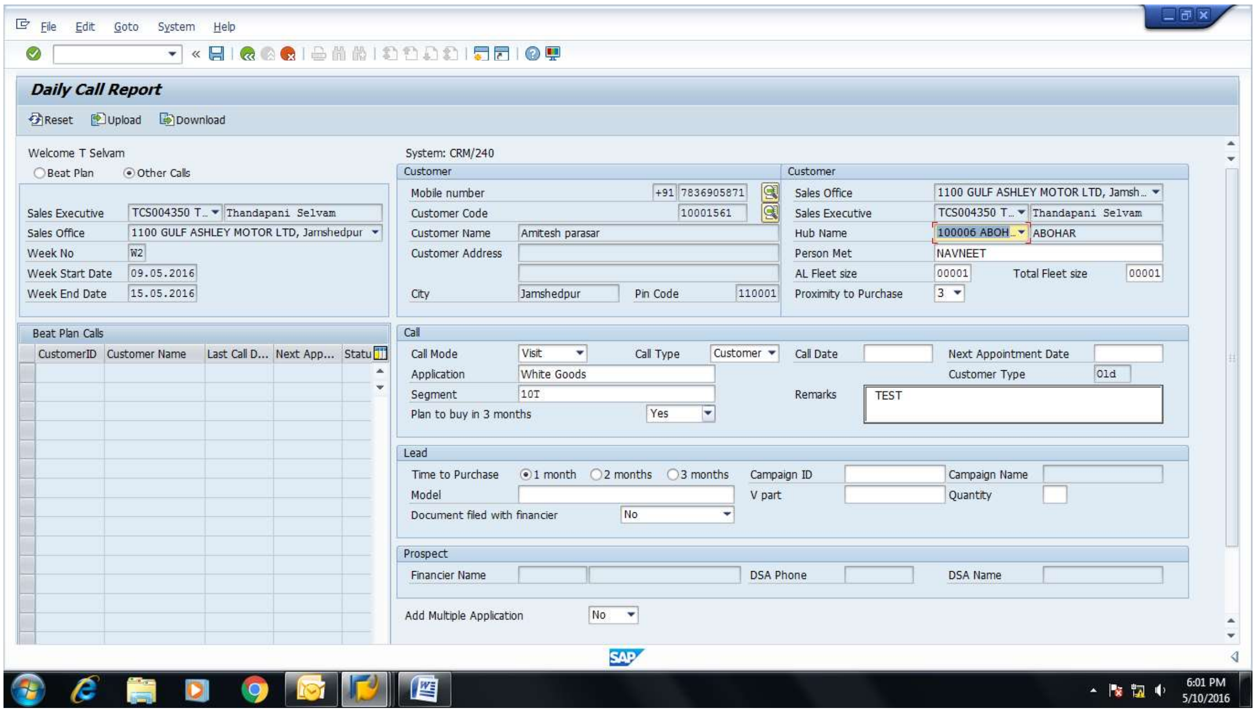
(1.a.i.5)Application – Select from the drop down (Mandatory)

(1.a.i.6)Segment – Select from the drop down (Mandatory)

(1.a.i.7)Customer Type- Automatically populated based on old or new customer (Always Grayed out)

(1.a.i.8)Remarks – Type any remarks (Mandatory)

(1.a.i.9)Plan to Buy in 3 months – Set Plan to Buy in 3 months to “Yes”. The Lead tab gets enabled.



The Lead Tab has the following fields:

1.1.1. Time to purchase – Set to 1 month by default. It can be changed according to the requirement.

1.1.2. Campaign ID – Select from the list. (Not mandatory)

1.1.3. Campaign Name – Automatically gets populated once the Campaign Id is selected.

1.1.4. Model – Select from the list (Mandatory filed)

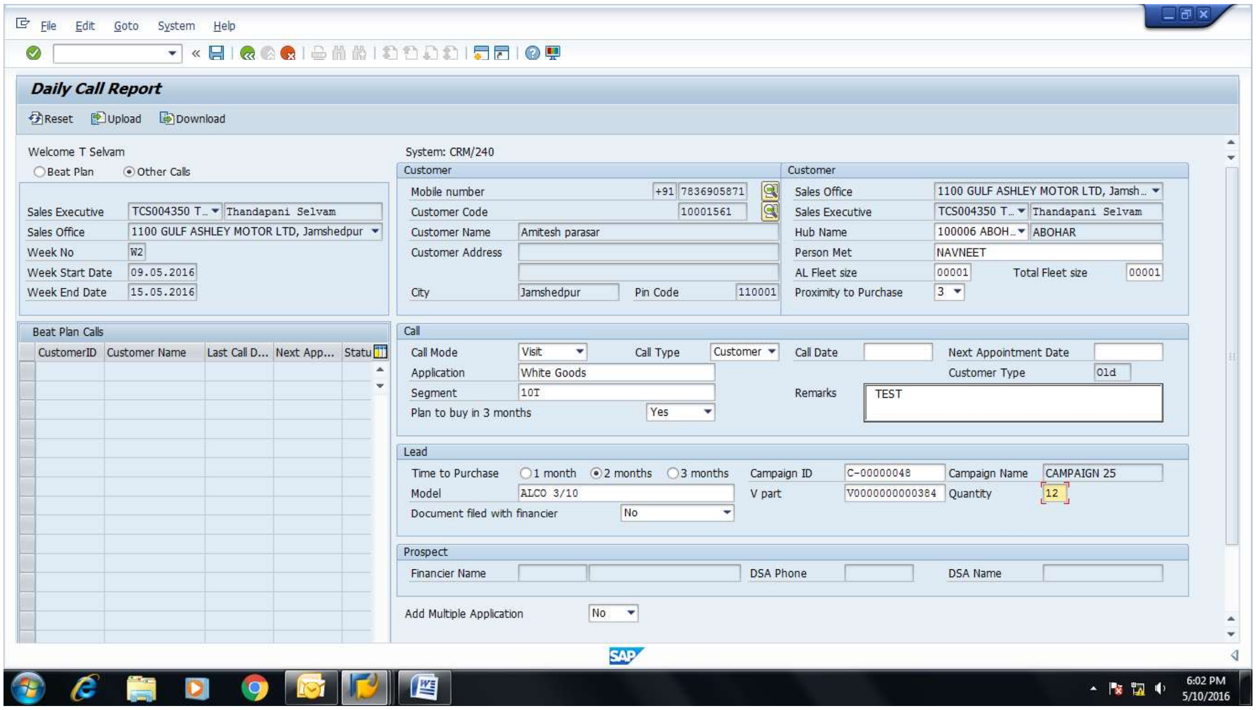
1.1.5. V-part – Select from the list (Not mandatory)

1.1.6. Quantity – Can give from 1 to 999 (Mandatory)

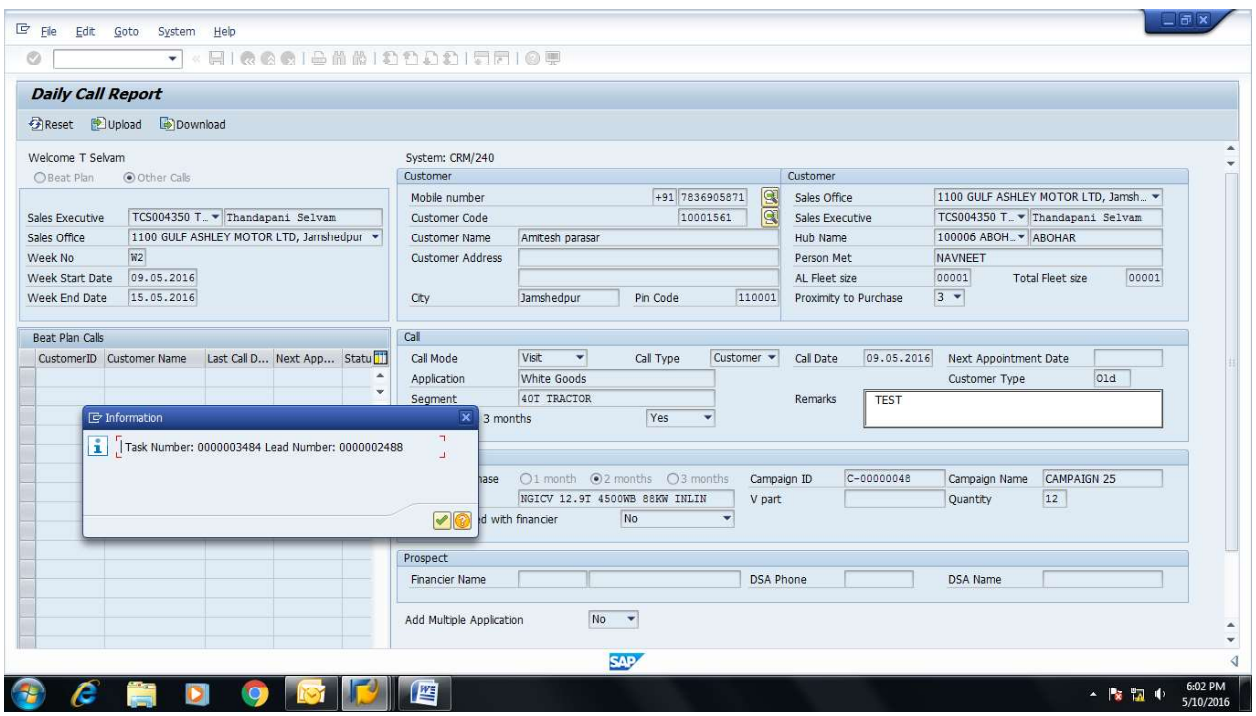
1.1.7. Document filed with financier- No (By default)

Click on save button to save the transaction.

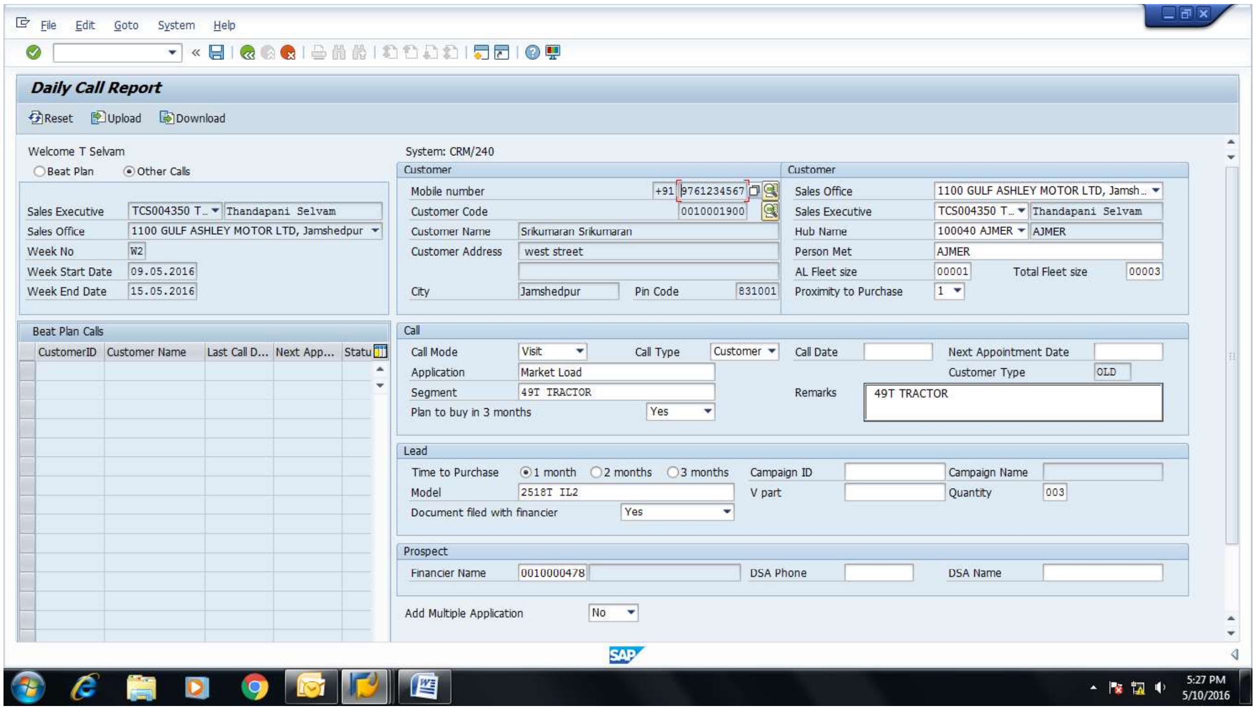
Note: Task cannot be created if the call date is repeated for the same customer, segment and application combination. So, make sure that call date differs for the same DCR data.



a) After clicking on save the task and lead are created with a unique number.



b) **Create Task, Lead and Prospect**: To search for an existing customer, mobile number or customer code can be given in the respective fields. If the customer with that particular mobile number or customer exists, the DCR data will get populated or you can click directly on search button to see the list of all existing customers.



Editable fields in this screen are Sales Office, Sales Executive, Hub Name, Person Met, AL fleet size, Total Fleet Size, Proximity to Purchase. Any changes required can be made and save the data only after giving Task details. Customer alone cannot be saved. Sales office, Sales executive, hub name and Proximity to Purchase are mandatory fields.

Note: AL fleet size should always be less than or equal to Total Fleet Size.

Task Creation: To create Task for this customer use Call Tab. The list of fields displayed are:

(1.a.i.1)Call Mode – Select from the drop down (Mandatory)

(1.a.i.2)Call Type – Select from the drop down (Mandatory)

(1.a.i.3)Call date – Select from the Calendar (Mandatory). Call date should be today's date or one month less than today's date.

(1.a.i.4)Next Appointment Date – Select from the calendar (Not mandatory). This date should be today's date or future date.

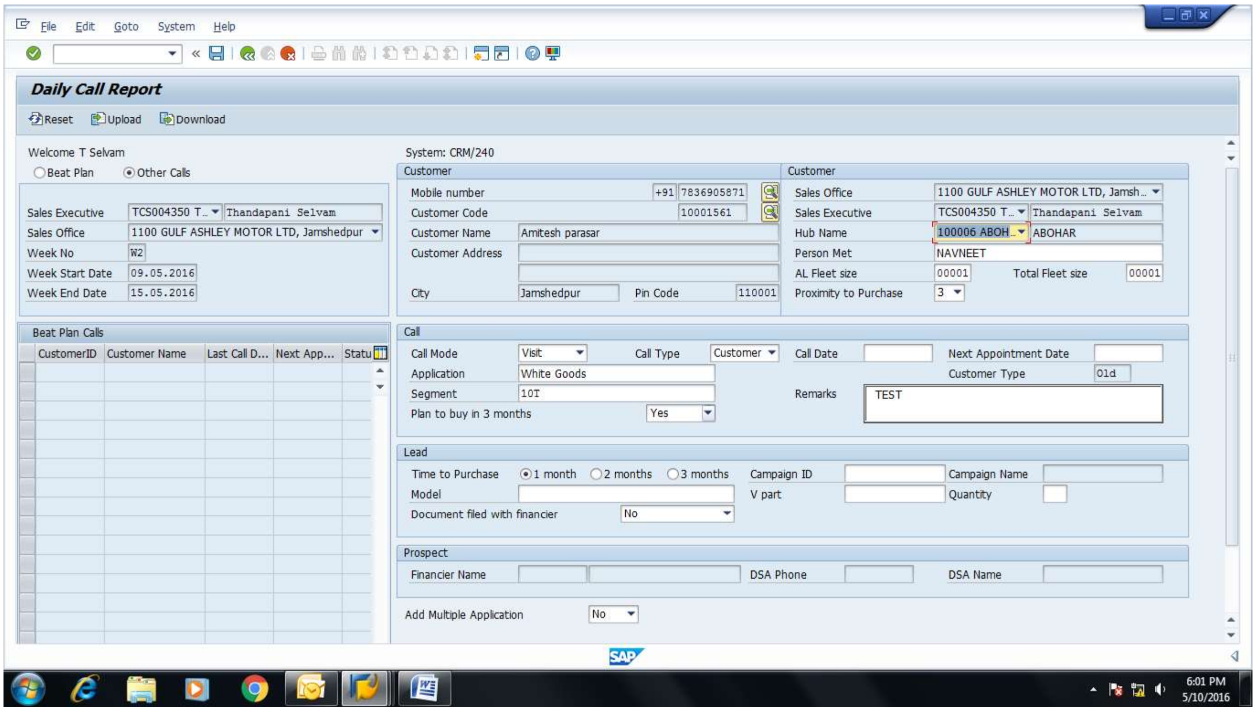
(1.a.i.5)Application – Select from the drop down (Mandatory)

(1.a.i.6)Segment – Select from the drop down (Mandatory)

(1.a.i.7)Customer Type- Automatically populated based on old or new customer (Always Grayed out)

(1.a.i.8)Remarks – Type any remarks (Mandatory)

(1.a.i.9)Plan to Buy in 3 months – Set plan to buy to "Yes". So that Lead tab gets enabled.



Lead Creation: The Lead Tab has the following fields:

1.a.i) Time to purchase – Set to 1 month by default. It can be changed according to the requirement.

1.a.ii) Campaign ID – Select from the list. (Not mandatory)

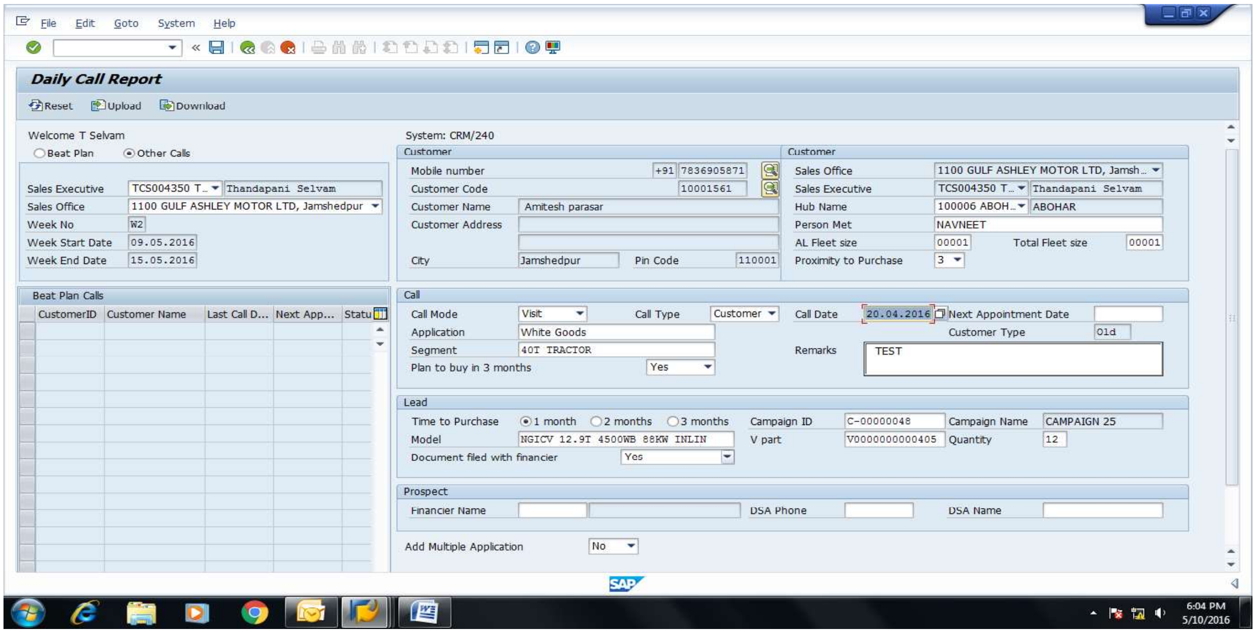
1.a.iii) Campaign Name – Automatically gets populated once the Campaign Id is selected.

1.a.iv) Model – Select from the list (Mandatory filed)

1.a.v) V-part – Select from the list (Not mandatory)

1.a.vi) Quantity – Can give from 1 to 999 (Mandatory)

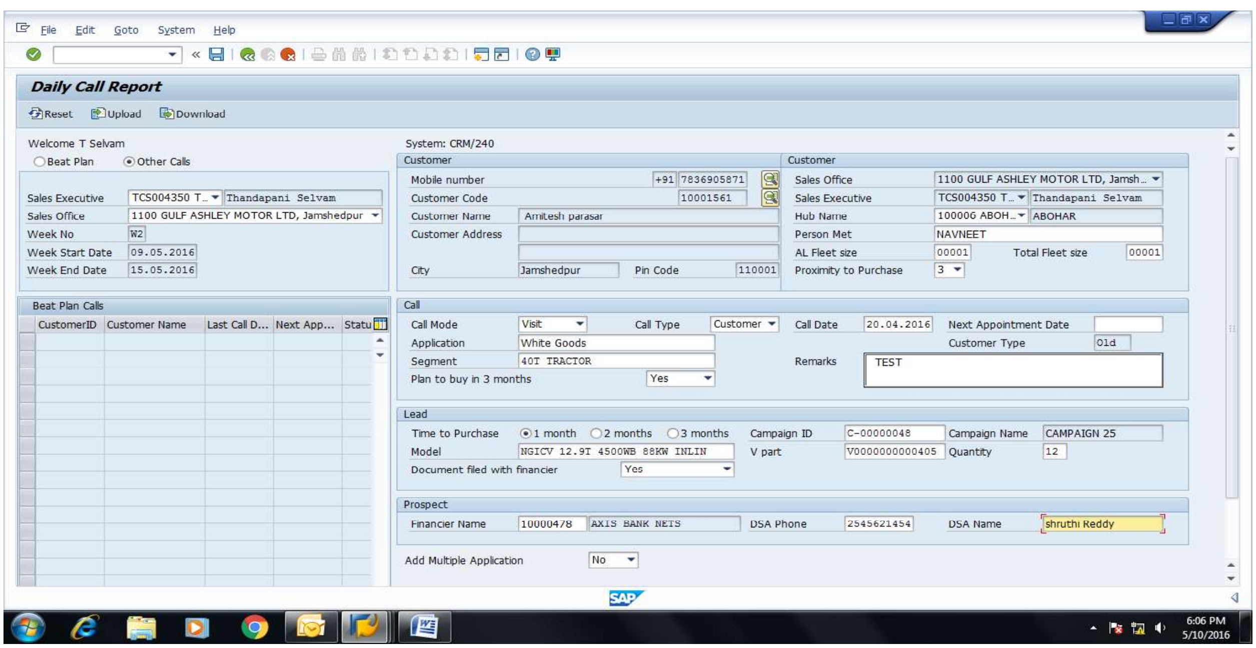
1.a.vii) Document Filed with Financier – Yes (So that Prospect tab gets enabled).



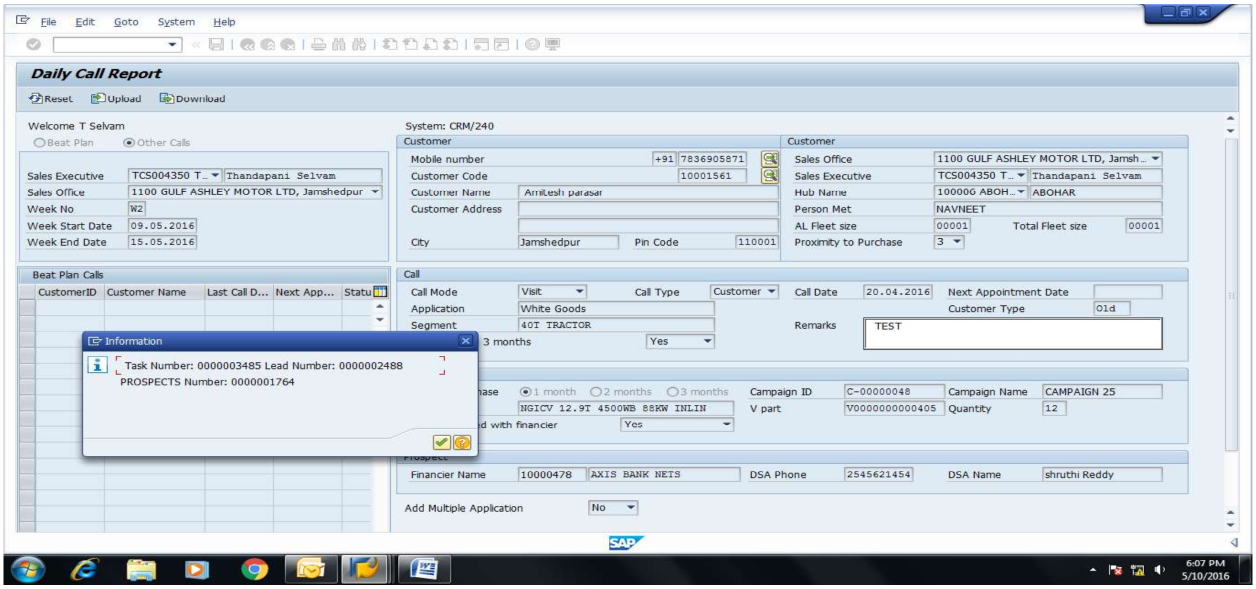
Prospect Creation: After the prospect tab gets enabled the following fields are displayed.

1) Financier name – Select from the list (Mandatory)
2) DSA Phone – Give a valid 10-digit mobile number. (Not mandatory)
3) DSA Name – Any name (Not mandatory)

Click on save button for the transaction to get saved.



After clicking on save Task, Lead and prospect are created.



Note: If you are changing only the call date and remaining fields are same in call tab, lead tab and prospect tab, after saving only Task number gets updated and Lead, prospect will remain the same.

a) **Other Calls – New Customer creation -** As soon as the T-code is executed, click on “Other Calls” radio button.

To create a new customer the inputs to be entered are

a) Mobile Number – Enter a valid 10-digit mobile number (Mandatory Field)

b) Customer name (Mandatory Filed)

c) Customer address (Mandatory field)

d) City & Pin Code – Gets automatically populated from the Hub

e) Sales office & Sales executive – Gets automatically populated from the Login User ID

f) Hub Name – Select from the drop down (Mandatory Field)

g) Person met – Any Person’s name (Not mandatory)

h) AL Fleet size – Enter any number between 0-99999 (Not mandatory)

i) Total Fleet Size – Enter any number between 0-99999 (Not mandatory)

j) Proximity to Purchase – Select from the drop down (Mandatory)

Note: a) Customer alone cannot be created. To save the customer Task should be created along with the customer. b) AL Fleet size should always be less than or equal to total fleet size.

Task Creation: The fields to be entered in "Task" tab is:

(1.a.i.1)Call Mode – Select from the drop down (Mandatory)

(1.a.i.2)Call Type – Select from the drop down (Mandatory)

(1.a.i.3)Call date – Select from the Calendar (Mandatory). Call date should be today's date or one month less than today's date.

(1.a.i.4)Next Appointment Date – Select from the calendar (Not mandatory). This date should be today's date or future date.

(1.a.i.5)Application – Select from the drop down (Mandatory)

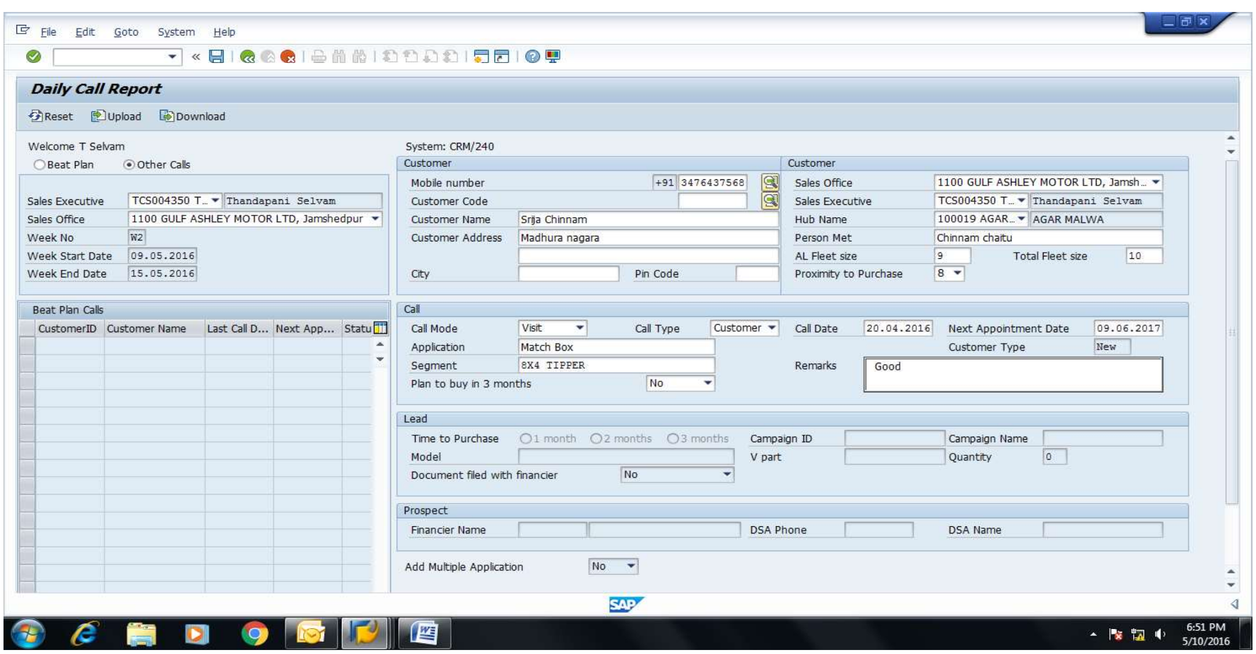
(1.a.i.6)Segment – Select from the drop down (Mandatory)

(1.a.i.7)Customer Type- Automatically populated based on old or new customer (Always Grayed out)

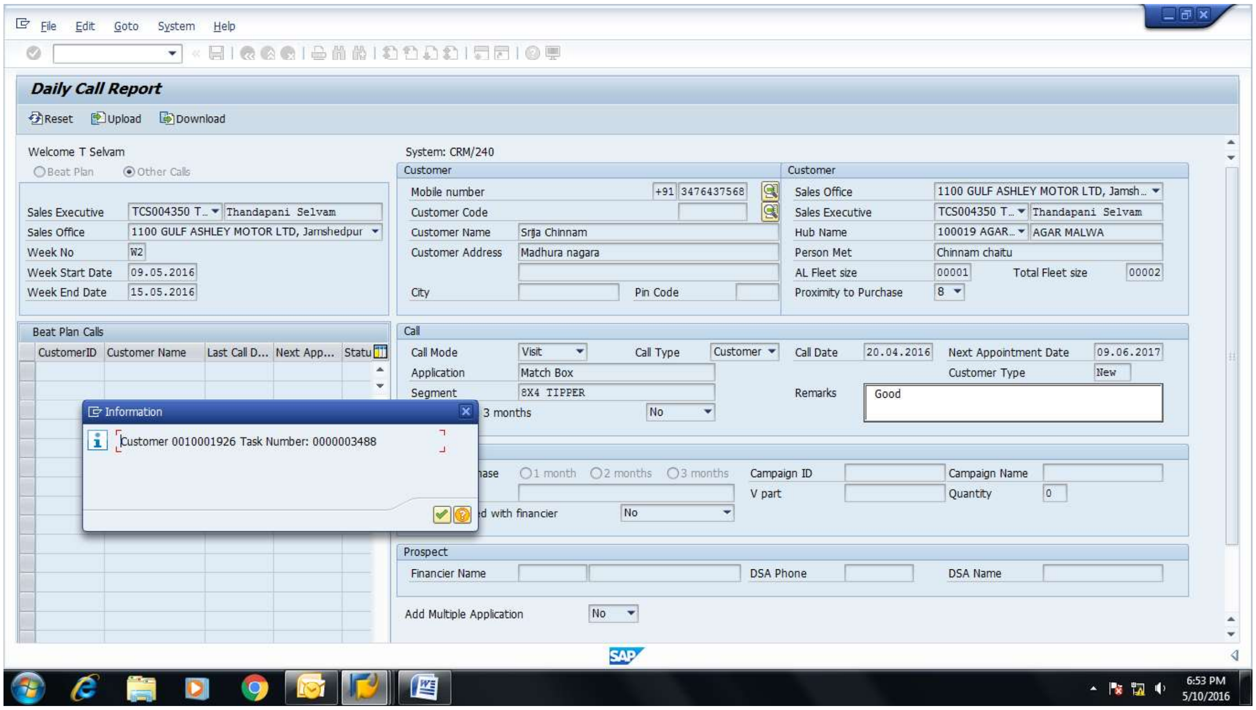
(1.a.i.8)Remarks – Type any remarks (Mandatory)

(1.a.i.9)Plan to Buy in 3 months – Set to "No" by default.

After giving all the necessary details click on save button.



After clicking on Save button, the transaction gets saved with unique customer number and task number.



a) **Other calls – New customer creation along with Task and Lead:** As soon as the T-code is executed, click on “Other Calls” radio button.

To create a new customer the inputs to be entered are

1.a.i) Mobile Number – Enter a valid 10-digit mobile number (Mandatory Field)

1.a.ii) Customer name (Mandatory Filed)

1.a.iii) Customer address (Mandatory field)

1.a.iv) City & Pin Code – Gets automatically populated from the Hub

1.a.v) Sales office & Sales executive – Gets automatically populated from the Login User ID

1.a.vi) Hub Name – Select from the drop down (Mandatory Field)

1.a.vii) Person met – Any Person's name (Not mandatory)

1.a.viii)AL Fleet size – Enter any number between 0-99999 (Not mandatory)

1.a.ix) Total Fleet Size – Enter any number between 0-99999 (Not mandatory)

1.a.x) Proximity to Purchase – Select from the drop down (Mandatory)

Note: a) Customer alone cannot be created. To save the customer Task should be created along with the customer. b) AL Fleet size should always be less than or equal to total fleet size.

Task Creation: The fields to be entered in "Task" tab is:

(1.a.i.1.a) Call Mode – Select from the drop down (Mandatory)

(1.a.i.1.b) Call Type – Select from the drop down (Mandatory)

(1.a.i.1.c) Call date – Select from the Calendar (Mandatory). Call date should be today's date or one month less than today's date.

(1.a.i.1.d) Next Appointment Date – Select from the calendar (Not mandatory). This date should be today's date or future date.

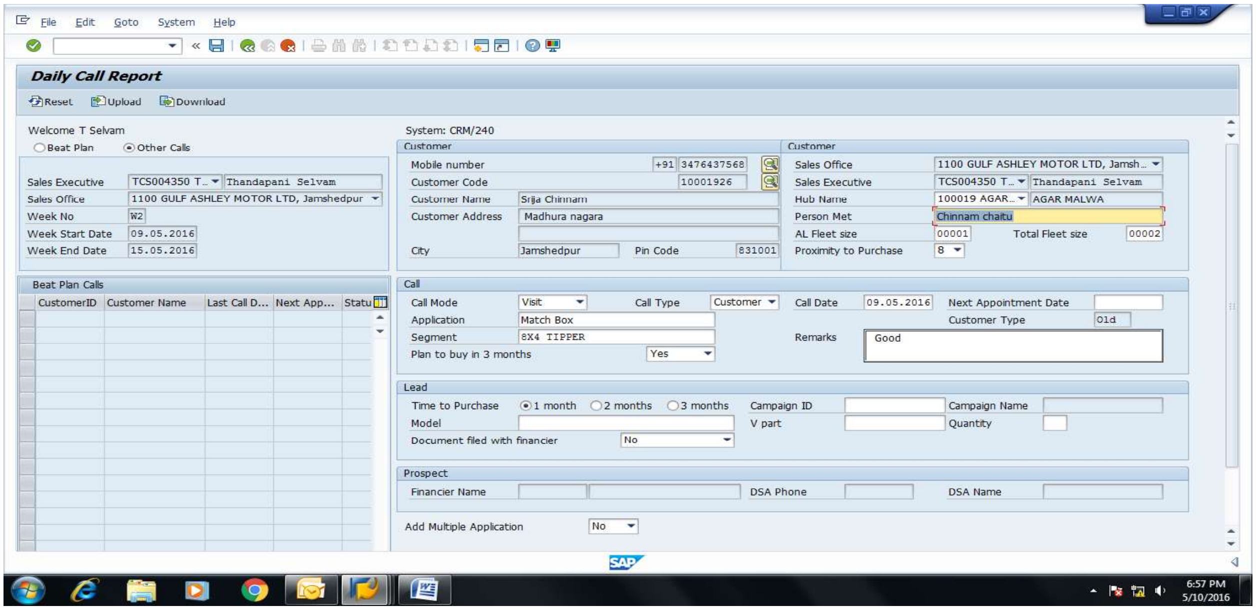
(1.a.i.1.e) Application – Select from the drop down (Mandatory)

(1.a.i.1.f) Segment – Select from the drop down (Mandatory)

(1.a.i.1.g) Customer Type- Automatically populated based on old or new customer (Always Grayed out)

(1.a.i.1.h) Remarks – Type any remarks (Mandatory)

(1.a.i.1.i) Plan to Buy in 3 months – To create a "lead" plan to buy should be set to "No" so that lead fields get enabled.



Lead Creation: The Lead Tab has the following fields:

1.a.i) Time to purchase – Set to 1 month by default. It can be changed according to the requirement.

1.a.ii) Campaign ID – Select from the list. (Not mandatory)

1.a.iii) Campaign Name – Automatically gets populated once the Campaign Id is selected.

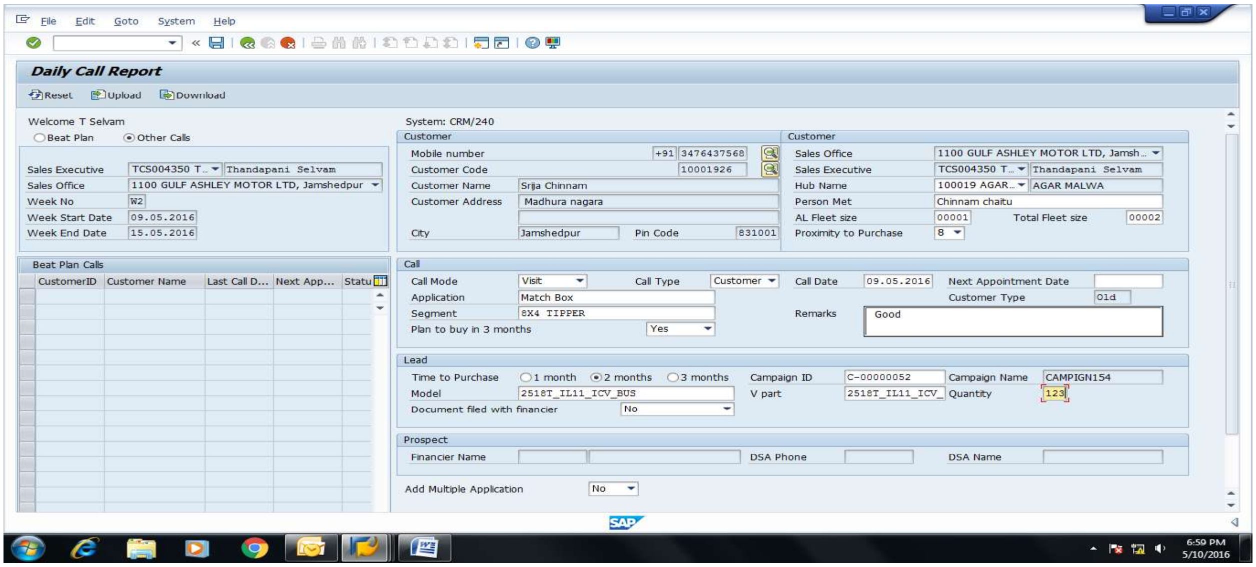
1.a.iv) Model – Select from the list (Mandatory filed)

1.a.v) V-part – Select from the list (Not mandatory)

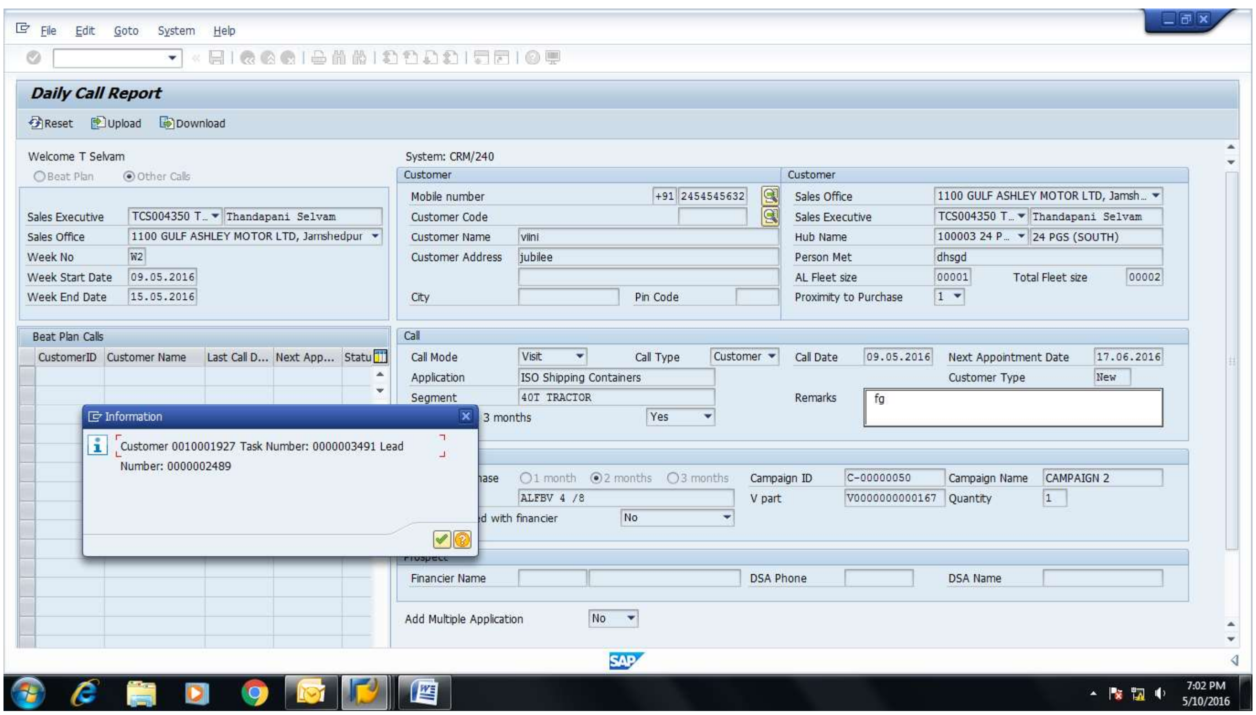
1.a.vi) Quantity – Can give from 1 to 999 (Mandatory)

1.a.vii) Document Filed with Financier – No (By Default)

After entering all the fields click on save button.



After clicking on “Save” the transaction gets saved with Unique Customer code, Task code and lead code.



a) **Creating New Customer, Task, Lead and Prospect**: As soon as the T-code is executed, click on “Other Calls” radio button.

To create a new customer the inputs to be entered are

(1.a.i.1)Mobile Number – Enter a valid 10-digit mobile number (Mandatory Field)

(1.a.i.2)Customer name (Mandatory Filed)

(1.a.i.3)Customer address (Mandatory field)

(1.a.i.4)City & Pin Code – Gets automatically populated from the Hub (No Mandatory)

(1.a.i.5)Sales office & Sales executive – Gets automatically populated from the Login User ID

(1.a.i.6)Hub Name – Select from the drop down (Mandatory Field)

(1.a.i.7)Person met – Any Person's name (Not mandatory)

(1.a.i.8)AL Fleet size – Enter any number between 0-99999 (Not mandatory)

(1.a.i.9)Total Fleet Size – Enter any number between 0-99999 (Not mandatory)

(1.a.i.10) Proximity to Purchase – Select from the drop down (Mandatory)

Note: a) Customer alone cannot be created. To save the customer Task should be created along with the customer. b) AL Fleet size should always be less than or equal to total fleet size.

Task Creation: The fields to be entered in "Task" tab is:

(1.a.i.1.a) Call Mode – Select from the drop down (Mandatory)

(1.a.i.1.b) Call Type – Select from the drop down (Mandatory)

(1.a.i.1.c) Call date – Select from the Calendar (Mandatory). Call date should be today's date or one month less than today's date.

(1.a.i.1.d) Next Appointment Date – Select from the calendar (Not mandatory). This date should be today's date or future date.

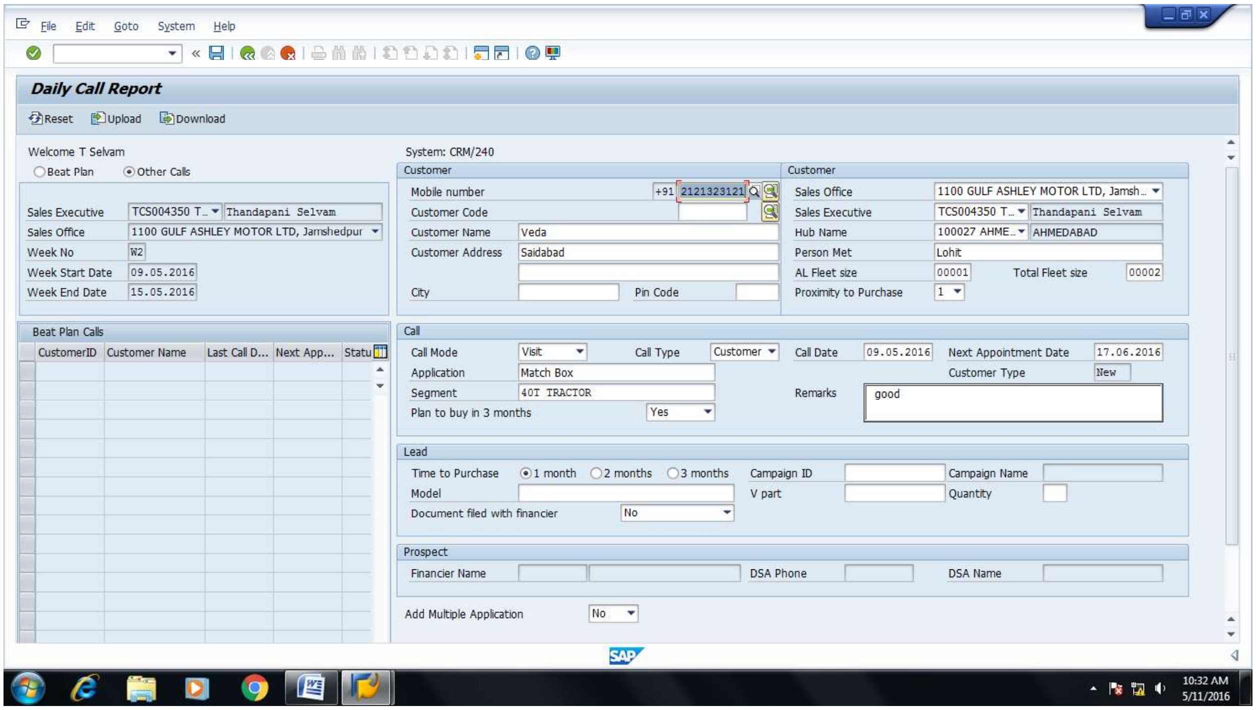
(1.a.i.1.e) Application – Select from the drop down (Mandatory)

(1.a.i.1.f) Segment – Select from the drop down (Mandatory)

(1.a.i.1.g) Customer Type- Automatically populated based on old or new customer (Always Grayed out)

(1.a.i.1.h) Remarks – Type any remarks (Mandatory)

(1.a.i.1.i) Plan to Buy in 3 months – To create a "lead" plan to buy should be set to "No" so that lead fields get enabled.



Lead Creation: The Lead Tab has the following fields:

1.a.i) Time to purchase – Set to 1 month by default. It can be changed according to the requirement.

1.a.ii) Campaign ID – Select from the list. (Not mandatory)

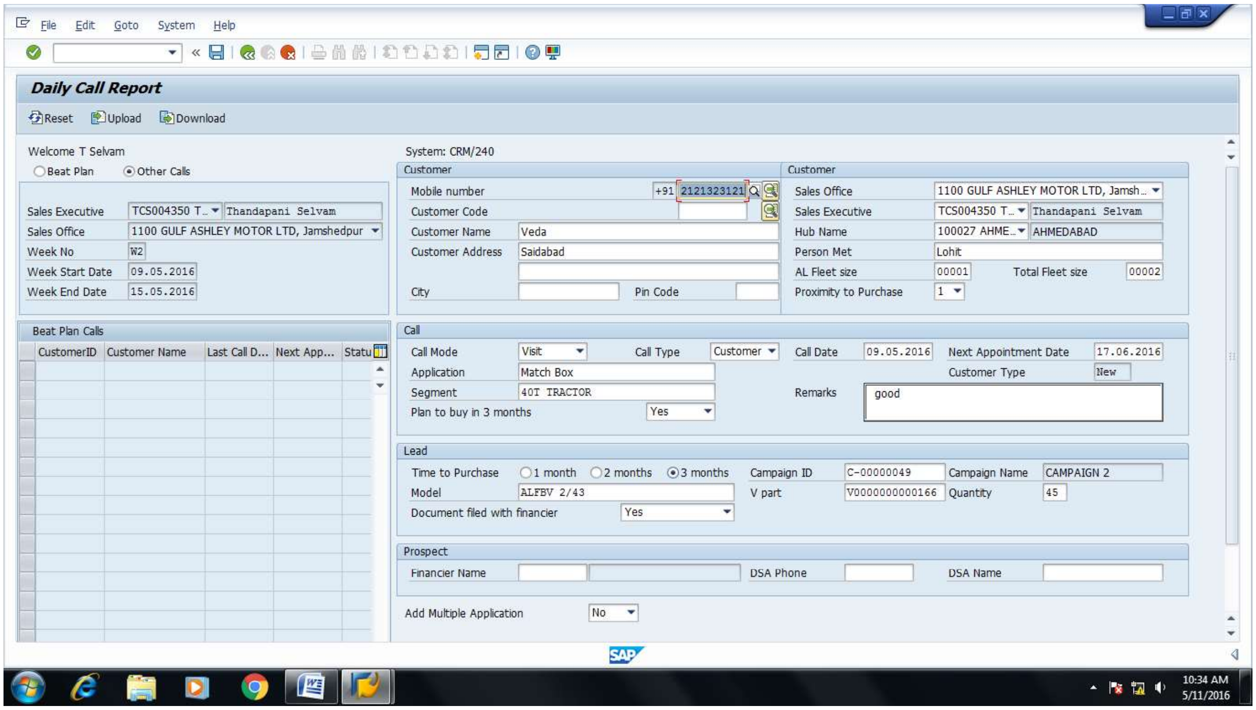
1.a.iii) Campaign Name – Automatically gets populated once the Campaign Id is selected.

1.a.iv) Model – Select from the list (Mandatory filed)

1.a.v) V-part – Select from the list (Not mandatory)

1.a.vi) Quantity – Can give from 1 to 999 (Mandatory)

1.a.vii) Document Filed with Financier – Set it as "Yes" so that the prospect tab gets enabled.



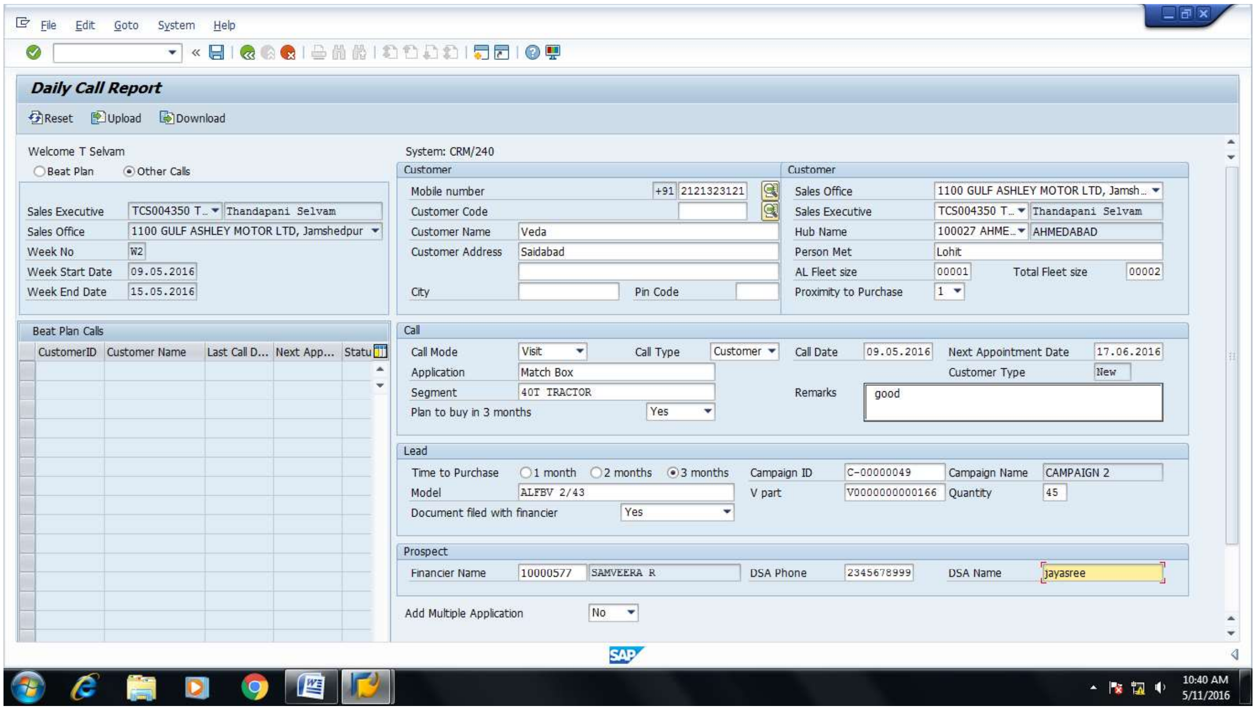
Prospect Creation: After the prospect tab gets enabled the following fields are displayed.

1) Financier name – Select from the list (Mandatory)

2) DSA Phone – Give a valid 10-digit mobile number. (Not mandatory)

3) DSA Name – Any name (Not mandatory)

Click on save button for the transaction to get saved.



After clicking on "Save" button the transaction gets saved with a unique customer number, Lead number and prospect number.