

# Customer Relationship Management

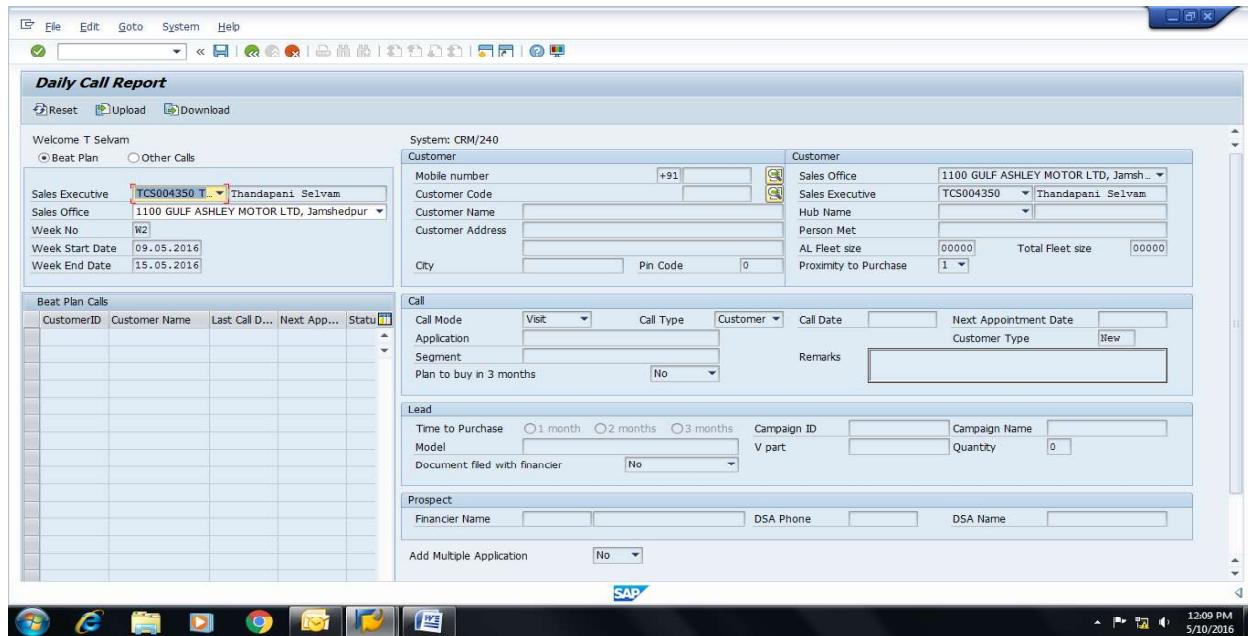
## User Manual for DCR Screen

**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.

**Daily Call Report**

Welcome T Selvam

System: CRM/240

<b>Customer</b>	<b>Customer</b>
Mobile number +91	Sales Office 1100 GULF ASHLEY MOTOR LTD, Jamsh...
Customer Code	Sales Executive TCS004350
Customer Name Selvam Thandapani	Hub Name Selvam Thandapani
Customer Address	Person Met
City	AL Fleet size 00000 Total Fleet size 00000
Pin Code 0	Proximity to Purchase 1

**Call**

Call Mode Visit	Call Type Customer	Call Date	Next Appointment Date
Application	Segment	V part	Customer Type New
Plan to buy in 3 months		Remarks	

**Lead**

Time to Purchase 01 month	02 months	03 months	Campaign ID	Campaign Name
Model	V part	Quantity 0	Document filed with financier No	

**Prospect**

Financier Name	USA Phone	USA Name
Add Multiple Application No		

**Beat Plan Calls**

CustomerID	Customer Name	Last Call D...	Next App...	Status
2090	amitesh priya			
10001350	Shiva Surya			
10001392	Chitra Devi Priya			
10000843	PONNIYIN SELVA...			
10001698	ARIVIVLAGAN A...	05.05.2016	11.05.2016	

SAP

**Daily Call Report**

Welcome T Selvam

System: CRM/240

<b>Customer</b>	<b>Customer</b>
Mobile number +91	Sales Office 1100 GULF ASHLEY MOTOR LTD, Jamsh...
Customer Code	Sales Executive 0000000254
Customer Name ANBARASAN R	Hub Name
Customer Address	Person Met
City	AL Fleet size 00000 Total Fleet size 00000
Pin Code 0	Proximity to Purchase 1

**Call**

Call Mode Visit	Call Type Customer	Call Date	Next Appointment Date
Application	Segment	V part	Customer Type New
Plan to buy in 3 months		Remarks	

**Lead**

Time to Purchase 01 month	02 months	03 months	Campaign ID	Campaign Name
Model	V part	Quantity 0	Document filed with financier No	

**Prospect**

Financier Name	USA Phone	USA Name
Add Multiple Application No		

**Beat Plan Calls**

CustomerID	Customer Name	Last Call D...	Next App...	Status
2090	amitesh priya			
10001350	Shiva Surya			
10001392	Chitra Devi Priya			
10000843	PONNIYIN SELVA...			
10001698	ARIVIVLAGAN A...	05.05.2016	11.05.2016	

SAP

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



This screenshot shows the SAP CRM Daily Call Report interface. At the top left, it says "Welcome R Anbarasan". On the right, there's a "Customer" section with fields like Mobile number (+91 4889917272), Sales Office (1100 GULF ASHLEY MOTOR LTD, Jamshedpur), and Sales Executive (R Anbarasan). Below this is a "Call" section with fields for Call Mode (Visit), Application (PONNIYIN SELVA), Segment (2090 amitesh priva), and Remarks (Plan to buy in 3 months). A "Lead" section follows with fields for Time to Purchase (1 month), Model (Shiva Surya), and V part (No). The bottom section is a "Prospect" with fields for Financier Name (Chitra Devi Prva) and DSA Name (Arivivalagan A.). The status bar at the bottom right shows the date as 5/11/2016 and time as 10:54 AM.

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.

This screenshot shows the SAP CRM Daily Call Report interface for a different user, T Selvam. The welcome message is "Welcome T Selvam". The customer details are: Sales Executive (R Anbarasan), Sales Office (1100 GULF ASHLEY MOTOR LTD, Jamshedpur), and Customer Name (ARIVIVALAGAN ARIVU). In the "Call" section, the application is listed as "MATCH BOX" and the segment as "6X4 TIPPER". The remarks field contains "FUNNEL FULL UPDATE". The status bar at the bottom right shows the date as 5/10/2016 and time as 12:23 PM.

- 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)

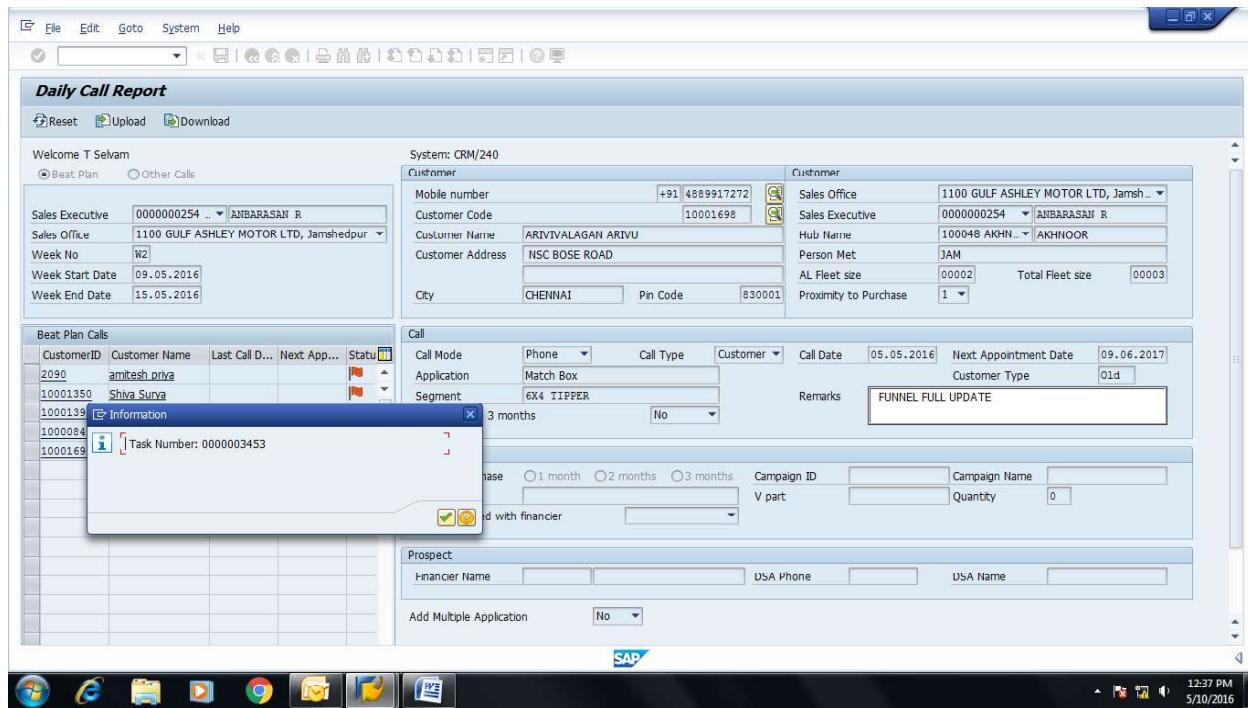
1.a.vi.Segment – Select from the drop down (Mandatory)

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

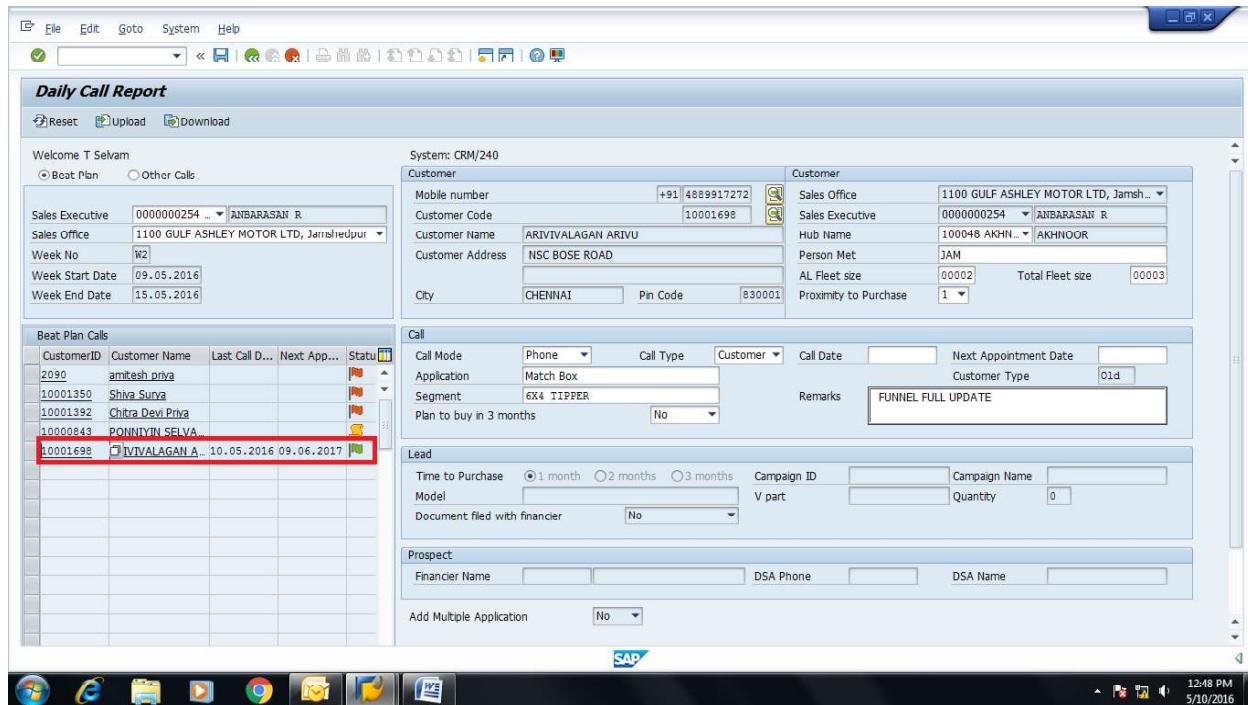
1.a.viii.Remarks – Type any remarks (Mandatory)

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.

The screenshot shows the SAP CRM 'Daily Call Report' interface. The 'Call' section contains a dropdown menu for 'Segment' with '6X4 TIPPER' selected. Below it, a field labeled 'Plan to buy in 3 months' has a dropdown menu with 'Yes' selected. This field is highlighted with a red rectangular box.

**Daily Call Report**

File Edit Goto System Help

Reset Upload Download

Welcome T Selvam

System: CRM/240

Customer		Customer	
Mobile number	+91 4889917272	Sales Office	1100 GULF ASHLEY MOTOR LTD, Jamsh...
Customer Code	10001698	Sales Executive	0000000254 ANBARASAN R
Customer Name	ARIVIVALAGAN ARIVU	Hub Name	100048 AKHN... AKHNOOR
Customer Address	NSC BOSE ROAD	Person Met	JAM
City	CHENNAI	AL Fleet size	00002 Total Fleet size 00003
Pin Code	630001	Proximity to Purchase	1

Beat Plan Calls

CustomerID	Customer Name	Last Call D...	Next App...	Status
2090	amitesh priya			Flag
10001350	Shiva Surya			Flag
10001392	Chitra Devi Priya			Flag
10000843	PONNIYIN SELVA...			Flag
10001698	ARIVIVALAGAN A...	10.05.2016	09.06.2017	Flag

Call

Call Mode	Phone	Call Type	Customer	Call Date	Next Appointment Date
Application	Match Box				
Segment	6X4 TIPPER				
Plan to buy in 3 months	Yes				
Remarks	FUNNEL FULL UPDATE				

Lead

Time to Purchase	1 month	2 months	3 months	Campaign ID	C-00000049	Campaign Name	CAMPAIGN 2
Model	4 X 4 MK III			V part	V000000000104	Quantity	789
Document filed with financier	No						

Prospect

Financier Name	DSA Phone	DSA Name

Add Multiple Application No

SAP

1:12 PM  
5/10/2016

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



The screenshot shows the SAP CRM/240 interface for the Daily Call Report. The top navigation bar includes File, Edit, Goto, System, and Help. Below the header, there are tabs for Daily Call Report, Reset, Upload, and Download.

**Customer Information:**

- Sales Executive: 0000000254 ... ANBARASAN R
- Sales Office: 1100 GULF ASHLEY MOTOR LTD, Jamshedpur
- Week No: W2
- Week Start Date: 09.05.2016
- Week End Date: 15.05.2016

**Customer Record:**

- Mobile number: +91 4889917272
- Customer Code: 10001698
- Customer Name: ARIVIVALAGAN ARIVU
- Customer Address: NSC BOSE ROAD
- City: CHENNAI
- Pin Code: 630001

**Call Plan:**

CustomerID	Customer Name	Last Call D...	Next App...	Status
2090	amitesh priva			Flagged
10001350	Shiva Surya			Flagged
1000139	Chitra Devi Priva	05.05.2016		Flagged
1000084	PONNIYIN SELVA...			Flagged
2090	amitesh priva			Flagged
10001350	Shiva Surya			Flagged
10001698	ARIVIVALAGAN A...			Flagged

**Call Tab (Details for Shiva Surya):**

- Call Mode: Phone
- Application: Match Box
- Segment: 6X4 TIPPER
- Plan to buy in 3 months: Yes
- Remarks: FUNNEL FULL UPDATE

**Lead Tab (Details for Shiva Surya):**

- Time to Purchase: 3 months
- Campaign ID: C-00000049
- Campaign Name: CAMPAIGN 2
- Model: 4 X 4 MR III
- V part: V0000000000104
- Quantity: 789
- Document filed with financier: No

**Prospect Tab:**

- Financier Name:
- DSA Phone:
- DSA Name:

**System Status:**

- Add Multiple Application: No

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

The screenshot shows the SAP CRM/240 interface for the Daily Call Report. The top navigation bar includes File, Edit, Goto, System, and Help. Below the header, there are tabs for Daily Call Report, Reset, Upload, and Download.

**Customer Information:**

- Sales Executive: 0000000254 ... Anbarasan R
- Sales Office: 1100 GULF ASHLEY MOTOR LTD, Jamshedpur
- Week No: W2
- Week Start Date: 09.05.2016
- Week End Date: 15.05.2016

**Customer Record:**

- Mobile number: +91 9239843109
- Customer Code: 10001350
- Customer Name: Shiva Surya
- Customer Address: 10 100 feet road
- City: chennai
- Pin Code: 600033

**Call Plan:**

CustomerID	Customer Name	Last Call D...	Next App...	Status
10001392	Chitra Devi Priva	05.05.2016		Flagged
10000843	PONNIYIN SELVA...			Flagged
2090	amitesh priva			Flagged
10001350	Shiva Surya			Flagged
10001698	ARIVIVALAGAN A...			Flagged

**Call Tab (Details for Shiva Surya):**

- Call Mode: Phone
- Application: Other applications(NonAC)
- Segment: ICV BUS
- Plan to buy in 3 months: No
- Remarks: Checking the quality of the program.

**Lead Tab (Details for Shiva Surya):**

- Time to Purchase: 3 months
- Campaign ID:
- Campaign Name:
- Model:
- V part:
- Quantity: 0
- Document filed with financier: No

**Prospect Tab:**

- Financier Name:
- DSA Phone:
- DSA Name:

**System Status:**

- Add Multiple Application: No

- 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

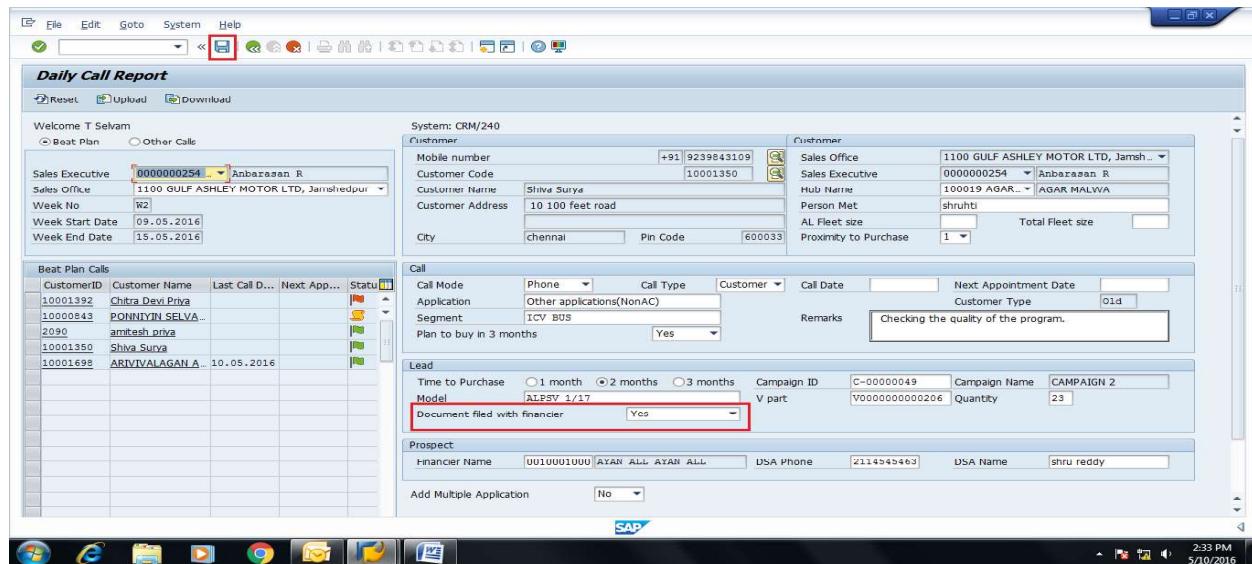
filed with Financier to “yes”. The Prospect tab gets enabled. The following fields get enabled.

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.

This screenshot shows the SAP CRM/240 interface for a 'Daily Call Report'. The main window displays 'Beat Plan Calls' and 'Call' details. A pop-up window titled 'Information' is open, showing 'Task Number: 0000003474 Lead Number: 0000002471' and 'PROSPECTS Number:'. The system status bar at the bottom indicates it's 5:02 PM on 5/10/2016.

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.

This screenshot shows the SAP CRM/240 interface for a 'Daily Call Report'. The 'Other Calls' tab is selected. In the 'Customer' section, the 'Customer Name' field is populated with 'Thandapani Selvam'. The system status bar at the bottom indicates it's 5:23 PM on 5/10/2016.

**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".

# Customer Relationship Management

**TATA CONSULTANCY SERVICES**

The screenshot shows the SAP CRM 'Daily Call Report' application. At the top, there's a toolbar with standard file operations like File, Edit, Goto, System, Help, and various icons for search, upload, download, and navigation. Below the toolbar, the title 'Daily Call Report' is displayed, followed by three buttons: Reset, Upload, and Download.

The main area is divided into several sections:

- Welcome T Selvam**: A message indicating the user's name.
- System: CRM/240**: The system identifier.
- Customer** section: Contains fields for Mobile number (+91 9761234567), Customer Code (0010001900), Customer Name (Srikanth Srikanth), Customer Address (west street), City (Jamshedpur), Pin Code (831001), Sales Office (1100 GULF ASHLEY MOTOR LTD, Jamsh...), Sales Executive (TCS004350 T...), Hub Name (100040 AJMER), Person Met (AJMER), AL Fleet size (00001), Total Fleet size (00003), and Proximity to Purchase (1).
- Call** section: Includes fields for Call Mode (Visit), Application (Market Load), Segment (49T TRACTOR), Plan to buy in 3 months (Yes), Next Appointment Date, Customer Type (OLD), Remarks (49T TRACTOR), and Lead information.
- Lead** section: Details about Time to Purchase (radio buttons for 1 month, 2 months, 3 months), Campaign ID, Model (2518T IL2), V part, Document filed with financier (Yes), and Quantity (003).
- Prospect** section: Fields for Financier Name (UUU00004/8), DSA Phone, and DSA Name.
- Beat Plan Calls**: A grid table with columns: CustomerID, Customer Name, Last Call D..., Next App..., Status.

At the bottom, the SAP logo is visible, along with the Windows taskbar showing other application icons like Internet Explorer, Google Chrome, and File Explorer. The system status bar at the bottom right shows the time as 5:24 PM and the date as 5/10/2016.

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.

This screenshot is identical to the one above, showing the SAP CRM 'Daily Call Report' interface. It displays the same sections: Welcome message, system identifier, customer details, call plan, lead information, prospect details, and beat plan calls. The data entered in the customer and call sections is the same as in the first screenshot. The taskbar and system status bar at the bottom are also identical, showing the SAP logo, Windows icons, and the time/date as 5:27 PM on 5/10/2016.



HINDUJA GROUP

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.

This screenshot shows the SAP CRM module for Customer Relationship Management. The main window title is "Daily Call Report". It displays various fields for a customer named "Shruvani Selvam" with mobile number +91 4365332542 and customer code 10001758. The "Call" section shows a visit mode, call type, customer, date, and time. A remarks field contains "Good". The "Lead" section includes fields for time to purchase (1 month), campaign ID, and quantity. The "Prospect" section lists financier name, USA phone, and USA name. The bottom status bar shows the SAP logo and the date/time 5/10/2016 5:32 PM.

- a) The task is created with a unique number.

This screenshot shows the same SAP CRM interface as above, but with a modal dialog box titled "Information" overlaid. The dialog box contains the message "Task Number: 000003479". The rest of the interface remains visible in the background.

- 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.

The screenshot shows the SAP CRM/240 interface for a 'Daily Call Report'. The top navigation bar includes File, Edit, Goto, System, and Help. Below the header, there are buttons for Reset, Upload, and Download. The main area is titled 'Daily Call Report' and displays the following sections:

- Welcome T Selvam**: Shows the user's name and role.
- Sales Executive**: TCS004350 T... Thandapani Selvam
- Sales Office**: 1100 GULF ASHLEY MOTOR LTD, Jamshedpur
- Week No**: W2
- Week Start Date**: 09.05.2016
- Week End Date**: 15.05.2016
- Customer** section: Mobile number +91 9761234567, Customer Code 0010001900, Customer Name Srikumaran Srikumaran, Customer Address west street, City Jamshedpur, Pin Code 831001.
- Customer** section: Sales Office 1100 GULF ASHLEY MOTOR LTD, Jamshedpur, Sales Executive TCS004350 T... Thandapani Selvam, Hub Name 100040 AJMER, Person Met AJMER, AL Fleet size 00001, Total Fleet size 00003, Proximity to Purchase 1.
- Call Plan Calls**: A grid showing Beat Plan Calls with columns: CustomerID, Customer Name, Last Call D..., Next App..., Status.
- Call** section: Call Mode Visit, Call Type Customer, Call Date, Next Appointment Date, Application Market Load, Segment 49I TRACTOR, Remarks 49I TRACTOR, Plan to buy in 3 months Yes.
- Lead** section: Time to Purchase 1 month, Application Market Load, Segment 49I TRACTOR, Campaign ID, Model 2518T II2, V part, Document filed with financier Yes, Campaign Name, Quantity 003.
- Prospect** section: Financier Name 0010000478, DSA Phone, DSA Name.
- Add Multiple Application**: Option to add multiple applications.

The SAP logo is visible at the bottom right, along with system status icons and the date/time (5:27 PM, 5/10/2016).

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 screenshot shows the SAP CRM Daily Call Report application. At the top, there's a toolbar with various icons. Below it, the title bar says "Daily Call Report". The main area is divided into several sections:

- Welcome T Selvam**: Includes fields for Sales Executive (TCS004350 T...), Sales Office (1100 GULF ASHLEY MOTOR LTD, Jamshedpur), Week No (W2), Week Start Date (09.05.2016), and Week End Date (15.05.2016).
- System: CRM/240**: A grid showing Customer details like Mobile number (+91 7836905871), Customer Code (10001561), and Sales Office (1100 GULF ASHLEY MOTOR LTD, Jamsh..). It also lists Sales Executive (TCS004350 T...), Hub Name (100006 ABOH..), Person Met (NAVNEET), AL Fleet size (00001), Total Fleet size (00001), and Proximity to Purchase (3).
- Call**: Contains fields for Call Mode (Visit), Application (White Goods), Segment (10T), and a dropdown for "Plan to buy in 3 months" which is set to "Yes". There's also a "Remarks" field containing "TEST".
- Lead**: Contains fields for Time to Purchase (radio buttons for 1 month, 2 months, 3 months, with 1 month selected), Campaign ID, Campaign Name, Model, V part, Document filed with financier (No), and Quantity.
- Prospect**: Contains fields for Financier Name, DSA Phone, and DSA Name.
- Beat Plan Calls**: A table showing a list of calls.

The SAP logo is visible at the bottom center. The taskbar at the bottom shows various application icons, and the system tray indicates the date as 5/10/2016 and the time as 6:01 PM.

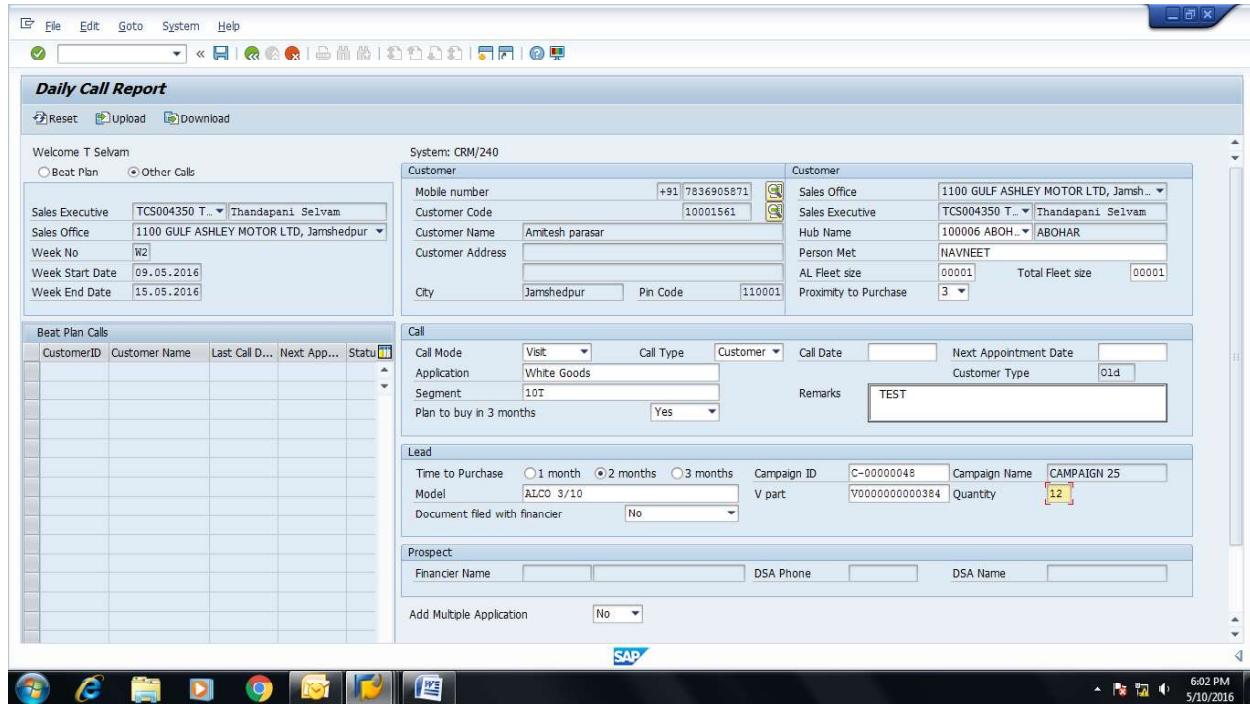
The Lead Tab has the following fields:

- 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 field)
- 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)

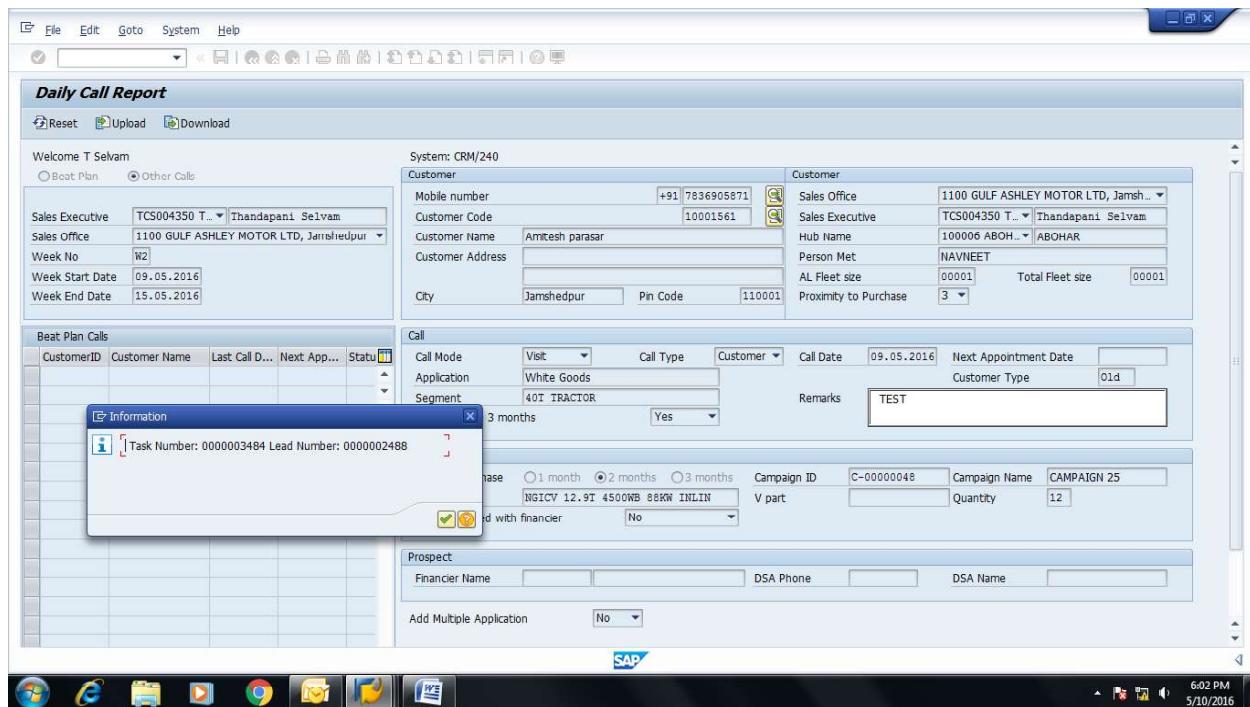
Click on save button to save the transaction.



**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.

The screenshot shows the SAP CRM interface for a 'Daily Call Report'. The top navigation bar includes File, Edit, Goto, System, and Help. Below the header, there are buttons for Reset, Upload, and Download. The main area is divided into several sections:

- Welcome T Selvam:** Includes fields for Sales Executive (TCS004350 T...), Sales Office (1100 GULF ASHLEY MOTOR LTD, Jamshedpur), Week No (W2), Week Start Date (09.05.2016), and Week End Date (15.05.2016).
- Customer:** Displays details for a selected customer: Mobile number (+91 9761234567), Customer Code (0010001900), Customer Name (Srikumar Srikumar), Customer Address (west street), City (Jamshedpur), Pin Code (831001). It also lists Sales Office (1100 GULF ASHLEY MOTOR LTD, Jamsh..), Sales Executive (TCS004350 T...), Hub Name (100040 AJMER), Person Met (AJMER), AL Fleet size (00001), Total Fleet size (00003), and Proximity to Purchase (1).
- Call:** Contains fields for Call Mode (Visit), Application (Market Load), Segment (49T TRACTOR), Plan to buy in 3 months (Yes), and Remarks (49T TRACTOR).
- Lead:** Includes Time to Purchase (radio buttons for 1 month, 2 months, 3 months), Campaign ID, Model (2518T IL2), V part, Document filed with financier (Yes), and Quantity (003).
- Prospect:** Shows Financier Name (UU1UUU4/8), USA Phone, and USA Name.
- Buttons:** Beat Plan, Other Calls, and a large Save button.
- System Status:** SAP logo, system status (OK), and system date/time (5/10/2016, 5:27 PM).

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.

The screenshot shows the SAP CRM 'Daily Call Report' application. The 'Lead' tab is currently selected, indicated by a blue border. The 'Lead' section contains fields for 'Time to Purchase' (radio buttons for 1 month, 2 months, 3 months), 'Campaign ID', 'Campaign Name', 'Model', 'V part', and 'Quantity'. Below the lead section, there is a 'Prospect' section with fields for 'Financier Name', 'DSA Phone', and 'DSA Name', along with a 'Add Multiple Application' checkbox. On the left side of the screen, there is a 'Beat Plan Calls' grid and a 'Customer' section with various details like mobile number, customer code, name, address, city, pin code, and proximity to purchase. The top menu bar includes File, Edit, Goto, System, and Help. The bottom taskbar shows various system icons and the SAP logo.

**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 field)
- 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).

This screenshot shows the SAP CRM Daily Call Report interface. The 'Prospect' tab is active, displaying fields for Financier Name (Armitesh parasar), DSA Phone (110001), and DSA Name (Shruthi Keddy). Other tabs like Customer, Call, Lead, and Prospect are also visible.

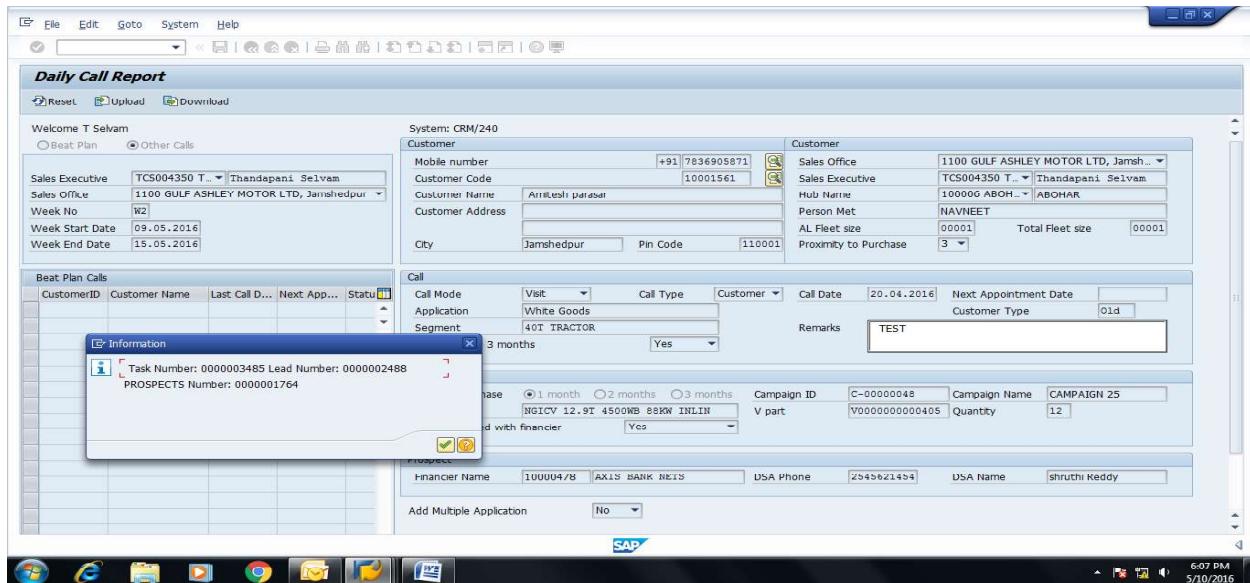
**Prospect Creation:** After the prospect tab gets enabled the following fields are displayed.

- 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.

This screenshot shows the SAP CRM Daily Call Report interface after saving. The 'Prospect' tab now displays the saved values: Financier Name (Shruthi Keddy), DSA Phone (2545621454), and DSA Name (Shruthi Keddy).

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.

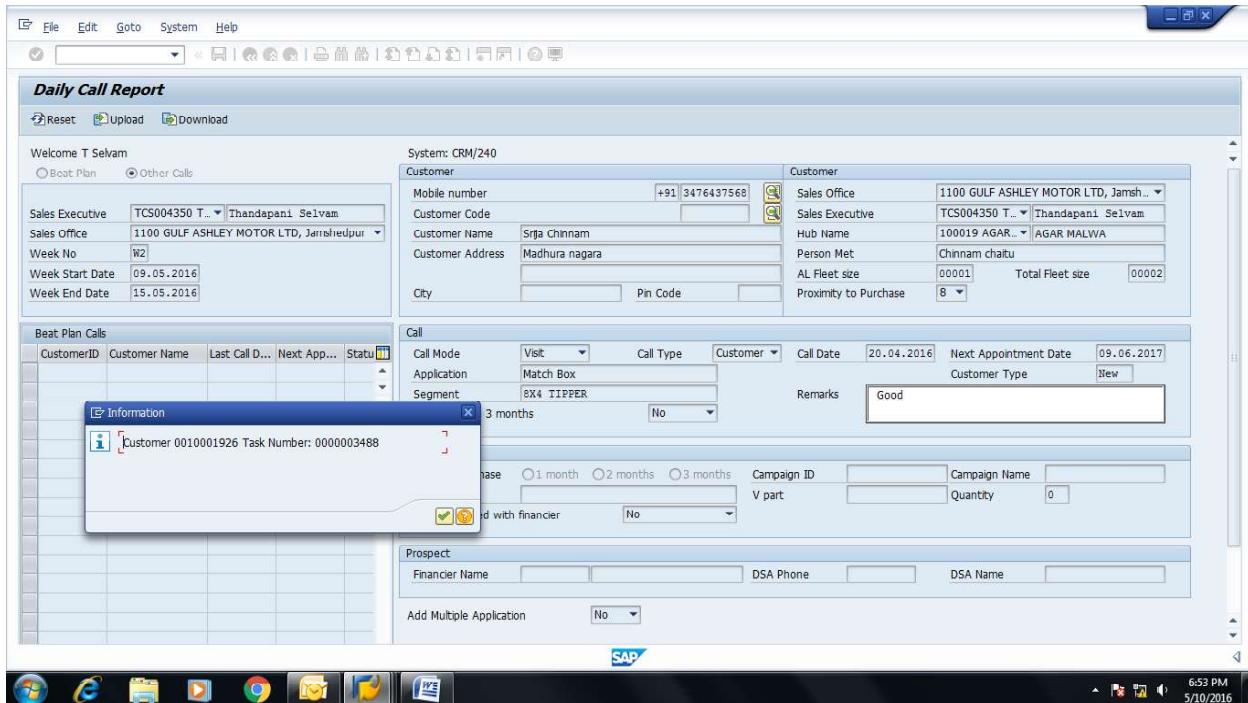
**Task Creation:** The fields to be entered in “Task” tab is:

- (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.

The screenshot shows the SAP CRM 'Daily Call Report' interface. The main title bar says 'Customer Relationship Management' and 'TATA CONSULTANCY SERVICES'. The window title is 'Daily Call Report'. The left sidebar has tabs for 'Beat Plan' (selected) and 'Other Calls'. Below it is a 'Sales Executive' section with fields for Sales Executive (TC5004350 T...), Sales Office (1100 GULF ASHLEY MOTOR LTD, Jamshedpur), Week No (W2), Week Start Date (09.05.2016), and Week End Date (15.05.2016). The right side contains several tabs: 'Customer' (with fields for Mobile number, Customer Code, Customer Name, Customer Address, City, Sales Office, Sales Executive, Hub Name, Person Met, AL Fleet size, Total Fleet size, and Proximity to Purchase), 'Call' (with fields for Call Mode (Visit), Application (Match Box), Segment (8X4 TIPPER), Plan to buy in 3 months (Yes), Remarks (Good), and Lead fields for Time to Purchase, Model, V-part, Document filed with financier, Campaign ID, Campaign Name, and Quantity), 'Lead' (with fields for Financier Name, DSA Phone, DSA Name, and Add Multiple Application), and 'Prospect' (with fields for Financier Name, DSA Phone, DSA Name, and Add Multiple Application). At the bottom, there's a toolbar with various icons and a SAP logo.

**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.



This screenshot shows the SAP CRM/240 Daily Call Report interface. The main window displays a 'Customer' record for '1100 GULF ASHLEY MOTOR LTD, Jamshedpur'. The 'Customer' section includes fields for Mobile number (+91 9476437568), Customer Code (10001926), Sales Office (TCS004350 T...), Sales Executive (Thandapani Selvam), Hub Name (100019 AGAR...), Person Met (Chinnam chaitu), AL Fleet size (00001), Total Fleet size (00002), and Proximity to Purchase (8). Below this is a 'Call' section with fields for Call Mode (Visit), Application (Match Box), Segment (8X4 TIPPER), and Remarks (Good). The 'Lead' section shows Time to Purchase (2 months), Campaign ID (C-00000052), Campaign Name (CAMPAIN154), Model (2518T\_II11\_ICV\_BOS), V part (2518T\_II11\_ICV), and Quantity (123). The 'Prospect' section includes Financier Name, DSA Phone, and DSA Name. At the bottom left, there's a 'Beat Plan Calls' grid. The system status bar at the bottom right shows '6:50 PM 5/10/2016'.

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

This screenshot shows the SAP CRM/240 Daily Call Report interface after a transaction has been saved. A modal dialog box titled 'Information' appears, stating: 'Customer 0010001927 Task Number: 0000003491 Lead Number: 0000002489'. The main window shows the updated customer record with a new Customer Code (2454545632) and other details like Sales Executive (Thandapani Selvam) and Hub Name (100003 24 PGS (SOUTH)). The 'Call' section remains the same. The system status bar at the bottom right shows '7:02 PM 5/10/2016'.

- 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.

The screenshot shows the SAP CRM interface for a 'Daily Call Report'. The top navigation bar includes File, Edit, Goto, System, and Help. Below the header, there are buttons for Reset, Upload, and Download. The main area is titled 'Daily Call Report' and shows 'System: CRM/240'. On the left, there's a 'Beat Plan Calls' grid. The right side contains several tabs: 'Customer', 'Call', 'Lead', and 'Prospect'. In the 'Customer' tab, fields include Mobile number (+91 2121323121), Customer Code (TCS004350 T...), Customer Name (Veda), Customer Address (Saidabad), Sales Office (1100 GULF ASHLEY MOTOR LTD, Jamshedpur), Sales Executive (TCS004350 T...), Hub Name (100027 AHMEDABAD), Person Met (Lohit), AL Fleet size (00001), Total Fleet size (00002), and Proximity to Purchase (1). In the 'Call' tab, fields include Call Mode (Visit), Application (Match Box), Segment (401 TRACTOR), Call Date (09.05.2016), Next Appointment Date (17.06.2016), Customer Type (New), Remarks (good), and a note 'Plan to buy in 3 months' with a dropdown set to 'Yes'. In the 'Lead' tab, fields include Time to Purchase (radio buttons for 1 month, 2 months, 3 months, selected 1 month), Campaign ID, Model, V part, Document filed with financier (Yes/No dropdown), and Campaign Name and Quantity fields. In the 'Prospect' tab, fields include Financier Name, DSA Phone, and DSA Name. At the bottom, there's an 'Add Multiple Application' button and a SAP logo. The taskbar at the bottom shows various icons and the date/time (10:32 AM, 5/11/2016).

**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 field)
- 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.



The screenshot shows the SAP CRM/240 interface for a 'Daily Call Report'. The top navigation bar includes File, Edit, Goto, System, and Help. Below the header are standard toolbar icons for Reset, Upload, Download, and search. The main title 'Daily Call Report' is displayed above a sub-header 'Welcome T Selvam'. A radio button for 'Beat Plan' is selected. The left sidebar lists 'Sales Executive' (TCS004350 T...), 'Sales Office' (1100 GULF ASHLEY MOTOR LTD, Jamshedpur), 'Week No' (W2), 'Week Start Date' (09.05.2016), and 'Week End Date' (15.05.2016). The right side displays 'System: CRM/240' and two tabs: 'Customer' and 'Customer'. The 'Customer' tab contains fields for Mobile number (+91 2121323121), Customer Code (Vedula), Customer Name (Saidabad), Customer Address (Saidabad), City, Pin Code, Sales Office (1100 GULF ASHLEY MOTOR LTD, Jamsh...), Sales Executive (TCS004350 T...), Hub Name (100027 AHME...), Person Met (Lohit), AL Fleet size (00001), Total Fleet size (00002), and Proximity to Purchase (1). The 'Call' section includes fields for Call Mode (Visit), Application (Match Box), Segment (401 TRACTOR), Call Date (09.05.2016), Next Appointment Date (17.06.2016), Customer Type (New), Remarks (good), Time to Purchase (radio buttons for 1 month, 2 months, 3 months selected), Campaign ID (C-00000049), Campaign Name (CAMPAIGN 2), Model (ALEFBV 2/43), V part (V0000000000166), Quantity (45), and Document filed with financier (Yes). The 'Lead' section includes Financier Name, DSA Phone, DSA Name, and Add Multiple Application (No). The bottom status bar shows SAP, system icons, and the date/time (10:34 AM, 5/11/2016).

**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.



Welcome T Selvam

Beat Plan  Other Calls

Sales Executive: TCS004350 T... Thandapani Selvam  
Sales Office: 1100 GULF ASHLEY MOTOR LTD, Jamshedpur  
Week No: W2  
Week Start Date: 09.05.2016  
Week End Date: 15.05.2016

System: CRM/240

**Customer**

Mobile number	+91 2121323121
Customer Code	
Customer Name	Vedula
Customer Address	Saidabad
City	
Pin Code	

**Customer**

Sales Office	1100 GULF ASHLEY MOTOR LTD, Jamsh...
Sales Executive	TCS004350 T... Thandapani Selvam
Hub Name	100027 AHME... AHMEDABAD
Person Met	Lohit
AL Fleet size	00001
Total Fleet size	00002
Proximity to Purchase	1

**Beat Plan Calls**

CustomerID	Customer Name	Last Call D...	Next App...	Status

**Call**

Call Mode	Visit	Call Type	Customer	Call Date	09.05.2016	Next Appointment Date	17.06.2016
Application	Match Box					Customer Type	New
Segment	401 TRACTOR						
Plan to buy in 3 months	Yes						
Remarks	good						

**Lead**

Time to Purchase	<input type="radio"/> 1 month	<input type="radio"/> 2 months	<input checked="" type="radio"/> 3 months	Campaign ID	C-00000049	Campaign Name	CAMPAIGN 2
Model	ALFBV 2/43			V part	V0000000000166	Quantity	45
Document filed with financier	Yes						

**Prospect**

Financier Name	1UUUUS//	SAIVEERA R	DSA Phone	2345678999	DSA Name	Jayasree
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Add Multiple Application: No

SAP

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

Welcome T Selvam

Beat Plan  Other Calls

Sales Executive: TCS004350 T... Thandapani Selvam  
Sales Office: 1100 GULF ASHLEY MOTOR LTD, Jamshedpur  
Week No: W2  
Week Start Date: 09.05.2016  
Week End Date: 15.05.2016

System: CRM/240

**Customer**

Mobile number	+91 5454543626
Customer Code	
Customer Name	Sreeja Boltam
Customer Address	
City	
Pin Code	

**Customer**

Sales Office	1100 GULF ASHLEY MOTOR LTD, Jamsh...
Sales Executive	TCS004350 T... Thandapani Selvam
Hub Name	100018 AFSA... AFSAL GANJ
Person Met	Chaitu
AL Fleet size	00001
Total Fleet size	00002
Proximity to Purchase	1

**Beat Plan Calls**

CustomerID	Customer Name	Last Call D...	Next App...	Status

**Call**

Call Mode	Visit	Call Type	Customer	Call Date	09.05.2016	Next Appointment Date	17.06.2016
Application	Packers and Movers					Customer Type	New
Segment	491 TRACTOR						
Plan to buy in 3 months	Yes						
Remarks	Good						

**Lead**

Time to Purchase	<input type="radio"/> 1 month	<input type="radio"/> 2 months	<input checked="" type="radio"/> 3 months	Campaign ID	C-00000048	Campaign Name	CAMPAIGN 25
Model	ALFBV 6/11			V part	V0000000000173	Quantity	12
Document filed with financier	Yes						

**Prospect**

Financier Name	0010000616	Fiancier Test	DSA Phone	4545623332	DSA Name	Shruthi Reddy
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Add Multiple Application: No

**Information**

Customer 0010001984 Task Number: 0000003555 Lead Number: 0000002514 PROSPECTS Number: 0000001812

SAP

