

# CRM Blueprint

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## **Super Admin:**

## **ADMIN:**

## **Dashboard:**

Login

Total sales

Total invoice

Today's sales

Today's invoice

Date selection for the invoice

Edit invoice (Super admin)

Reports

To-do list

Tickets

Task report

Recent Orders

Email inbox

Notifications ( Inhouse Messages )

Sales Targets

## **Sales Master:**

Name

Business name

Phone number

Business address

Email address

Bill to

Ship to

Material name

Quantity

Price per item

Total price

Discount

TAX

Note

Review

Print/save/forward via email

**Material Master:**

Material name

Colour

Size

Bar code

Stock quantity

Price

Tax rate

Discount price

Special discount for special customers

### **Customer Master:**

Customer name

Gender

DOB:

Anniversary:

Address ( multiple )

Phone number

Alternate Number

Email address

Priority

Category

Bill to

Ship to

### **Employee:**

Reports

Sales

Enquiries

Customer info (Employee Specific)

Sales Targets

### **Reports:**

Overall Sales Report

Product wise sales report

Enquiry report

Product wise enquiry report

Income vs Expense

Total purchase report

Employee attendance report

Employee specific sales report (Enquiry vs Sales)

**Enquiry:**

Name

Business name

Contact number

Email ID

Product

Quantity

Price

discount

Expected purchase date

Enquiry Type ( Walk-in, Direct, Facebook etc.)

Next Follow up date

**Invoice:**

Auto Invoice (for fix Invoice amount)

Name

Business name

Contact Number

Address

Bill to

Ship to

GST No

Invoice No (Auto)

Date (Auto)

Due date

Billing period

Description

Tax rate

Quantity

Price

Discount

Bank details

Note

## **CRM**

### **Follow up:**

Name

Mobile Number 1

Mobile number 2

Email address

Address

Followup date

Followup time

Feedback

Next followup date & time

### **Reminders:**

Task details

Assigned employee

Date

Time

Priority

Reminders over message (TXT message)

### **To-Do List:**

Calendar

Daily task List

Priority

Sort

Preference

### **SMS Marketing:**

Triggers;

1. Birthday
2. Anniversary
3. Purchase habit
4. Buying behavior
5. Offers according to buying limit
6. Max days without purchase reminder
7. Subscription reminders
8. Indian festival wishes
9. Gender wise sorting

## **Customer Report:**

Name

Contact number

Email address

Last Purchase Details

Purchase history

Average purchase amount

## **Extra:**

Expense calculator

Stock Adjustment

Contact Management

Lead Management

Mobile App for on field sales team for the important reminders (internal birthday reminder, inhouse communication and sales & tasks updates.)

Sales analytics

## **HRM:**

Roster

Present, absent, Half day, paid leave, loss of pay marking.

Salary calculation (Basic, PF and other taxes)

Employee details. (Full Name, address, contact number, Emergency contact Number, Pan Number, Adhar Number, designation, Department, date of joining, Birthday, Basic Salary, tire code, extra note)

Suggestions and feedbacks section

Total Salary

Total employees working days behavior (Present vs Absent days)

Employee wise reports

Department wise reports

Total P.F. and taxes reports

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