This CRM system will be developed using PHP as its foundation, offering a robust platform for managing various aspects of customer relations. Within this system, there will be five distinct user roles, each with specific responsibilities and permissions:

Super Admin: This role holds the highest level of authority, with complete control over the CRM system. Super Admins can configure settings, manage user accounts, and access all features and data.

Manager: Managers oversee the healthcare, motor and non motor teams within the organization. They have the authority to upload the data sheet, monitor team performance, and generate reports tailored to their areas of responsibility.

Team Leader: Team Leaders are responsible for guiding and coordinating the activities of their respective teams. They can provide support to team members as needed.

Verifier: Verifiers play a crucial role in ensuring data accuracy and compliance within the CRM system. They review and validate information entered by Agents for healthcare clients, identifying any errors that require correction.

Agent: Agents are frontline users who interact directly with customers. They enter and update customer data which they have recieved, manage inquiries and requests to deliver exceptional service.

<u>Key functionalities for this CRM:</u>

User Management:

-The Super Admin can create user accounts with essential details such as Name, Email ID, Contact Number, Agent Code, User ID, and Password.
-Additionally, the Super Admin can assign specific roles to users using a dropdown menu. The available roles include Manager, Team Leader, Verifier, with Agent as the default role.

Data Import:

-The Super Admin possesses the capability to upload or import essential Excel sheets into the system.
-Upon uploading the Excel sheet, the user can specify the type of policy it pertains to, whether it's motor, non-motor, or healthcare.
-The fields within the Excel will vary based on the policy type.

Data Allocation:

-The Super Admin has the authority to assign imported data to specific agents, multiple agents, or all agents.
-When designated to a particular agent, all the data becomes accessible within their user account. For multiple agents, the data is equitably distributed, with each agent viewing one set at a time.
-If allocated to all agents, each receives one set of data sequentially. After necessary updates, the subsequent set of data appears on-screen.

Data Disposition:

-Agents can update data by modifying calling statuses, adding remarks, and leaving comments.

Follow-up with the Data:

-If a client requests a callback, they can specify the preferred date and time.
-Users receive notifications once follow-up appointments with clients are scheduled.

Search Data:

-Users have the capability to search for required data for which they've already updated the status, particularly useful for callback purposes.

Data Verification:

-Verifiers are empowered to cross-verify client details, particularly for healthcare-related policies, once the lead is closed by an Agent.

Data Finalization:

-Managers receive finalized data from agents for motor and non-motor policies or from verifiers for healthcare policies.
-They conduct necessary cross-verification and create finalized policies for clients.

Data Deletion:

-After 2-3 months of client inactivity and upon reviewing final comments, users can delete data.
-Users are able to select the specific month for data deletion.

Reports:

-Users have the option to export necessary data using filters related to dispositions.

Functionalities required as per the users

Super Admin

User Management:
- Add Users > Name, Email ID, Contact Number, Agent ID, User ID & Password
-Manage Users > Edit, Assign a Role, Delete

- For Team Leader:
  -Assign N number of Agents
- For Manager and Verifier:
  -Assign N number of Team Leaders

Import/Upload Data:
-Upload Excel > Choose Policy Type: Healthcare, Motor, Non-Motor > Select agents/users > Single, Multiple and All
-Manage Uplaoded Data > Live updates can be viewed > Edit, Delete

Updating the status against a Data:
-Select Data > Edit the Data > First Dispostion: Call Back, Lead Done, Ringing, Not Interested, Sale, Cancelled (select any) > Add Remark (calling status)> Add Comment (Agent's Comment)

- Call Back > Add Date, Add Time
- Lead Done > Send for Verification (Healthcare), Send for Finalization (Motor & Non - Motor)

Data Verification:
-Closed leads > Deposition: Call Back, Ringing, Not Interested, Cancelled, Verified
-Verified leads
-Pending for verirfication leads

Data Finalization:
-Closed leads > Created Policy, Cancelled, Edit, Delete
-Finalized leads
-Pending for finalization leads

Search Option:
-Search Bar > View Data > Edit, Delete

Report:
-Export Data Sheet > Filters: All, Call Back, Lead Done, Ringing, Not Interested, Sale, Cancelled

Manager

Import/Upload Data:
-Upload Excel > Choose Policy Type: Healthcare, Motor, Non-Motor > Select agents/users > Single, Multiple and All
-Manage Uplaoded Data > Live updates can be viewed > Edit, Delete

Updating the status against a Data:
-Select Data > Edit the Data > First Dispostion: Call Back, Lead Done, Ringing, Not Interested, Sale, Cancelled (select any) > Add Remark (calling status)> Add Comment (Agent Comment)

- Call Back > Add Date, Add Time
- Lead Done > Send for Verification (Healthcare), Send for Finalization (Motor & Non - Motor)

Follow-up with the Data:
-Users receive notifications once follow-up appointments with clients are scheduled.

Data Verification:
-Closed leads > Deposition: Call Back, Ringing, Not Interested, Cancelled, Verified
-Verified leads
-Pending for verirfication leads

Data Finalization:
-Closed leads > Created Policy, Cancelled, Edit, Delete
-Finalized leads
-Pending for finalization leads

Search Option:
-Search Bar > View Data > Edit, Delete

Report:
-Export Data Sheet > Filters: All, Call Back, Lead Done, Ringing, Not Interested, Sale, Cancelled

Team Leader

Updating the status against a Data: (Team Leader can view the Data allotted to the N number of Agents that have been assigned to them)
-Select Data > Edit the Data > First Dispostion: Call Back, Lead Done, Ringing, Not Interested, Sale, Cancelled (select any) > Add Remark (calling status)> Add Comment (Agent Comment)

- Call Back > Add Date, Add Time

- Lead Done > Send for Verification (Healthcare), Send for Finalization (Motor & Non - Motor)

Follow-up with the Data:
-Users receive notifications once follow-up appointments with clients are scheduled.

Search Option:
-Search Bar > View Data > Edit, Delete

Report:
-Export Data Sheet > Filters: All, Call Back, Lead Done, Ringing, Not Interested, Sale, Cancelled

Verifier

Data Verification: (Verifier can view the Data allotted to the N number of Team Leaders that have been assigned to them)
-Closed leads > Deposition: Call Back, Ringing, Not Interested, Cancelled, Verified

- Verified Leads: will goes to the manager for further process

-Verified leads
-Pending for verirfication leads

Search Option:
-Search Bar > View Data > Edit, Delete

Agent

Updating the status against a Data:
-Select Data > Edit the Data > First Dispostion: Call Back, Lead Done, Ringing, Not Interested, Sale, Cancelled (select any) > Add Remark (calling status)> Add Comment (Agent Comment)

- Call Back > Add Date, Add Time
- Lead Done > Send for Verification (Healthcare), Send for Finalization (Motor & Non - Motor)

-Data table of the updated status which can be filtered according to the disposition
-Data gets mapped to the end user

Search Option:
-Search Bar > View Data > Edit, Delete