### **Department**

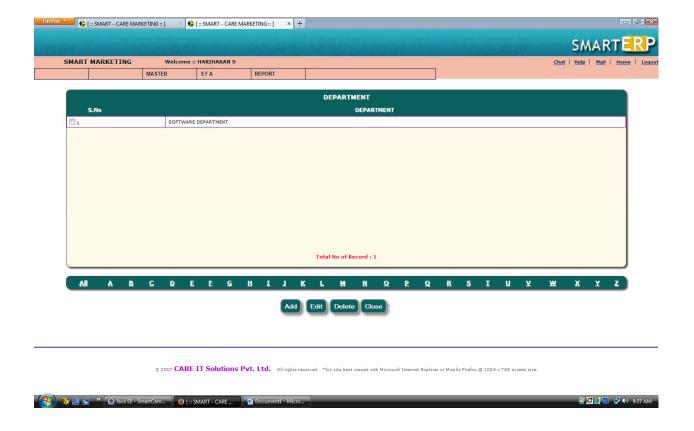
This is **Department** view screen. We can **add**, **edit**, and **delete** the **Department**.

To add a new **Department** by click the **add** button

To edit **Department** by click the **edit** button

To delete the **Department** by click the **delete** button.

To filter the department by using alphabetically.



### Add page

To add a Department by click the add button in Department view screen

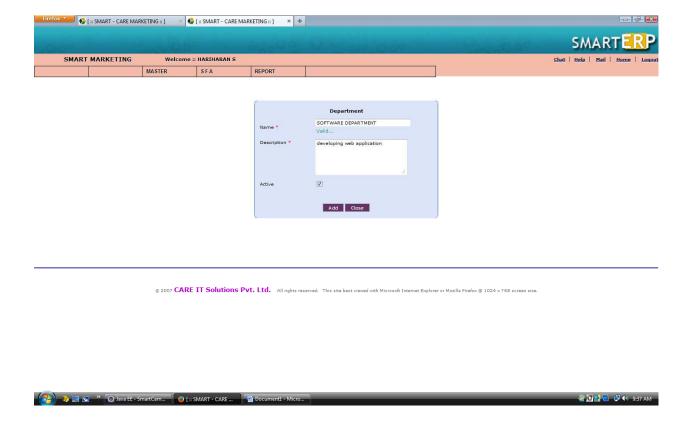
Enter the Name, description Select the Active

Click the add button.

The \* mark fields are mandatory

The \* mark fields validate during the submission.

The department added successfully.



### **Edit page**

To edit Department by click the add button in Department view screen

Modify the Name, description

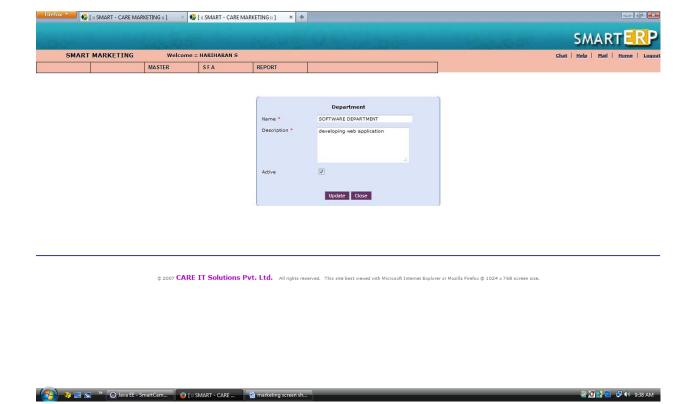
Select the Active

Click the update button.

The \* mark fields are mandatory.

The \* mark fields validate during the submission.

The department update successfully.



## **Designation view**

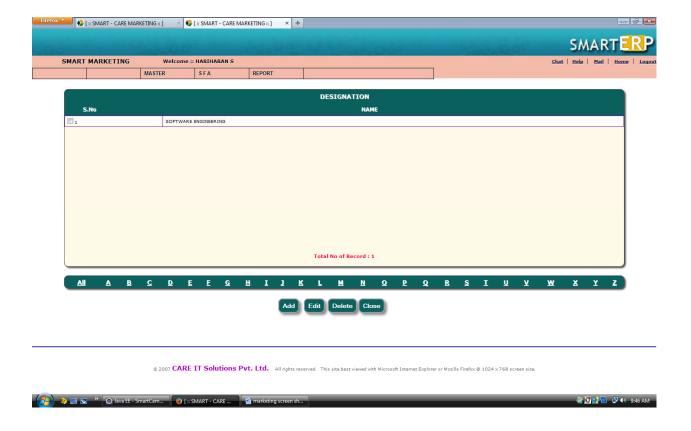
This is **Designation** view screen. We can **add**, **edit**, and **delete** the **Designation**.

To add a new **Designation** by click the **add** button

To edit **Designation** by click the **edit** button

To delete the **Designation** by click the **delete** button.

To filter the designation by using alphabetically.



## Add page

To add a Designation by click the add button in Designation view screen

Enter the Name, description Select the Active

Click the add button.

The \* mark fields are mandatory

The \* mark fields validate during the submission.

The designation added successfully.





### **Edit page**

To edit a Designation by click the edit button in Designation view screen

Modify the Name, description.

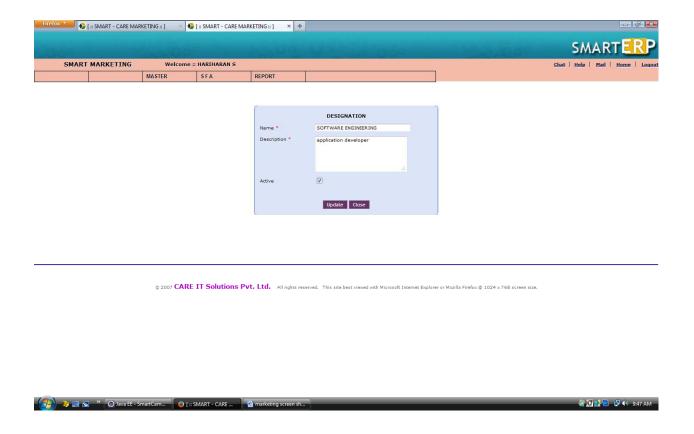
Select the Active.

Click the update button.

The \* mark fields are mandatory

The \* mark fields validate during the submission.

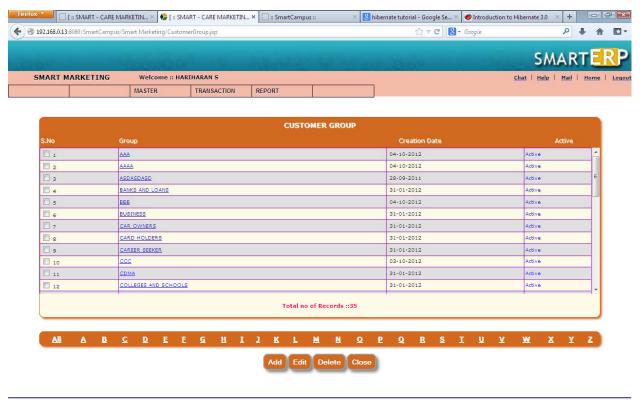
The designation update successfully.



### **Customer group**

This is **Customer Group** view screen. We can **add**, **edit**, and **delete** the **Customer Group** 

Make to add a new **Customer Group** by click the **add** button Make to edit **Customer Group** by click the **edit** button Want to delete the **Customer Group** by click the **delete** button. The view screen filtered by alphabetically.



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#### **Customer Group add page**

You want to add a customer group by click the add button in customer group view screen

Enter the Name

Select the Date of Registration

Tick a Active checkbox.

Click the submit button.

The \* mark fields are mandatory

The \* mark fields validate during the submission.

The Customer Group successfully added.



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### **Customer Group edit page**

Edit or Modify a Customer Group Choose or tick the check box for customer group record in view screen Click the Edit button in customer group in view screen

Modify the Name

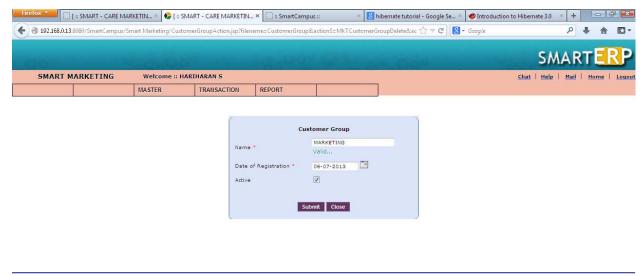
Modify the Date of Registration.

Tick or select the Active checkbox.

The \* fields are mandatory.

The \* fields validate when I submit the edit page.

The customer group update successfully.



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#### Customer

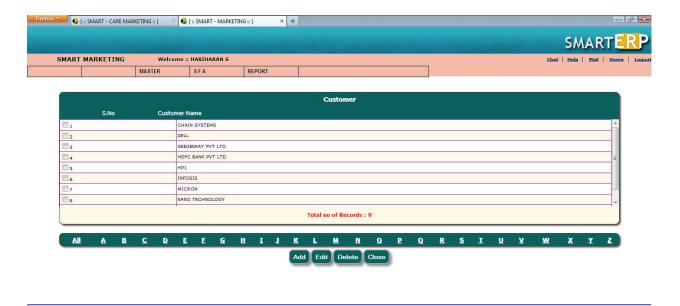
This is **customer** view screen. We can **add**, **edit**, and **delete** the **customer** 

To add a new customer by click the add button

To edit customer by click the edit button

To delete **customer** by click the delete button.

To filter customer by alphabetically.



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### Add page

To add a customer by click the add button in customer view screen

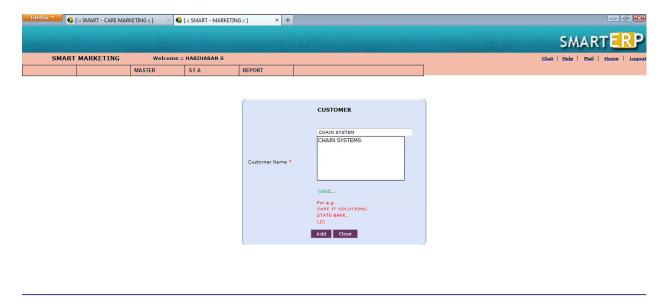
Enter the customer Name

Click the Add button.

The \* mark fields are mandatory

The \* mark fields validate during the submission.

The customer added successfully.



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### **Edit page**

To edit a customer by click the edit button after select the customer in customer view screen

Modify the customer Name

Click the Edit button.

The \* mark fields are mandatory

The \* mark fields validate during the submission.

The customer update successfully.



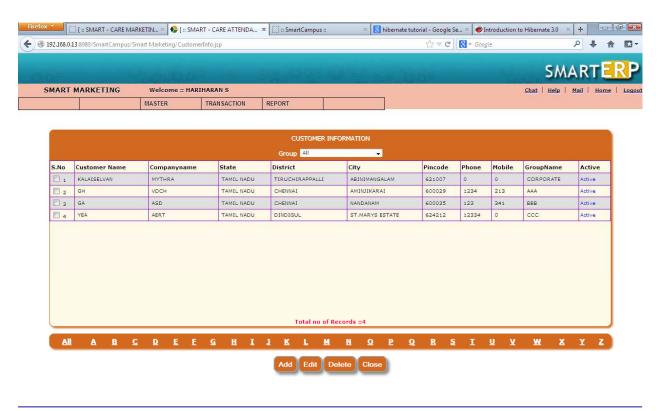
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#### **Customer Information**

This is **customer information** view screen. We can **add**, **edit**, and **delete** the **customer information** 

Make to add a new **customer information** by click the **add** button Make to edit **customer information** by click the **edit** button Make to delete **customer information** by click the delete button. The view customer information record filter by alphabetically as well group.



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### **Customer information add page**

You want to add a customer information by click the add button in customer information view screen

Enter the Company Name, Contact Person, Address1, Address2, Address3.

Enter the Phone 1, Extn 1, Phone 2, Extn 2, Mobile 1.

Enter the Mobile 2, Fax, Email, Website.

Select the Department, Designation, Country, State, District, Location.

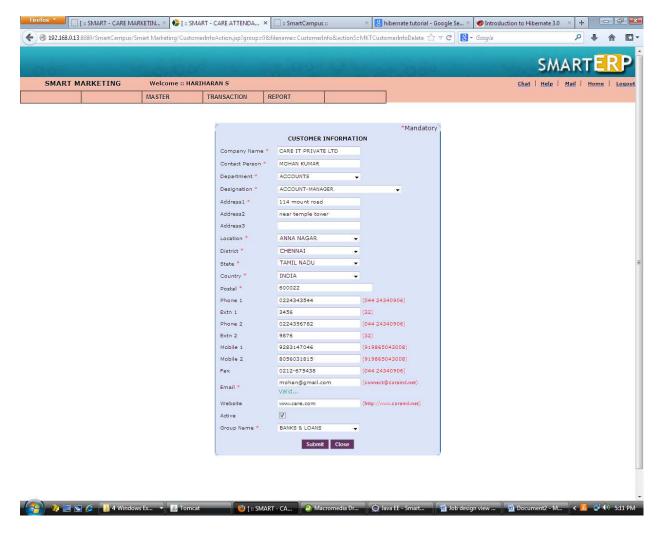
Tick a Active checkbox.

Click the submit button.

The \* mark fields are mandatory

The \* mark fields validate during the submission.

The customer information added successfully.



### **Customer Information edit page**

Edit or Modify a Customer information

Choose or tick the check box for customer information record in view screen Click the Edit button in customer information in view screen

Modify the Company Name, Contact Person, Address1, Address2, Address3.

Modify the Phone 1, Extn 1, Phone 2, Extn 2, Mobile 1.

Modify the Mobile 2, Fax, Email, Website.

Change the Department, Designation, Country, State, District, Location.

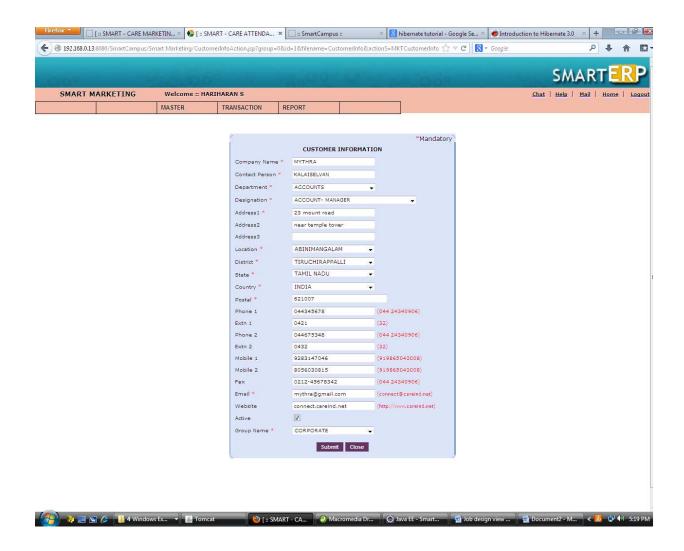
Tick a Active checkbox.

Click the submit button.

The \* mark field are mandatory.

The \* mark fields validate when click the submit button.

The customer information update successfully.



### Call type

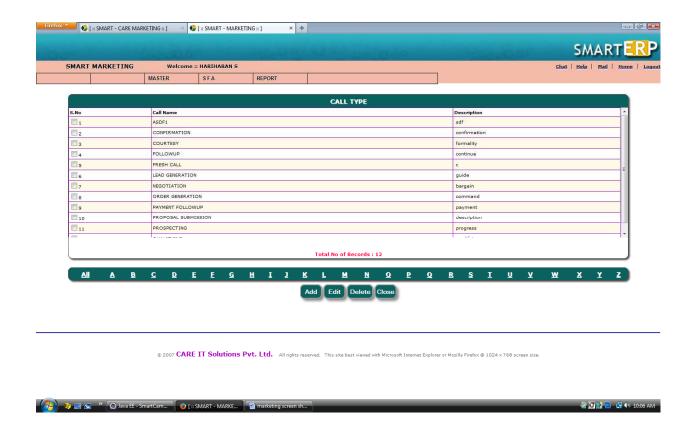
This is **call type** view screen. We can **add**, **edit**, and **delete** the **call type**.

To add a new call type by click the add button

To edit call type by click the edit button

To delete **call type** by click the delete button.

To filter call type record by alphabetically.



# Add page

You want to add a call type by click the add button in call type view screen

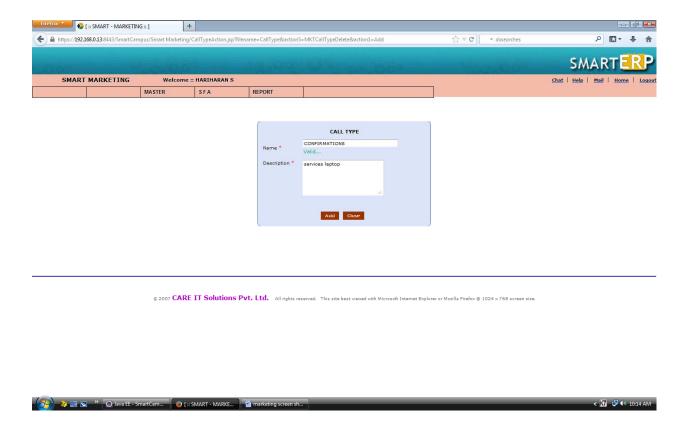
Enter the name, description.

Click the add button.

The \* mark fields are mandatory

The \* mark fields validate when click the add button.

The call type added successfully.



### **Edit page**

To edit a call type by click the edit button after select a call type record in call type view screen

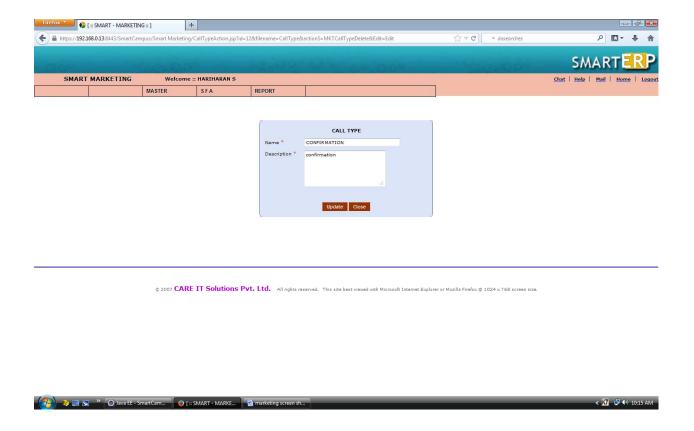
Enter the name, description.

Click the update button.

The \* mark fields are mandatory

The \* mark fields validate when click the update button.

The call type update successfully.



### **Daily calls**

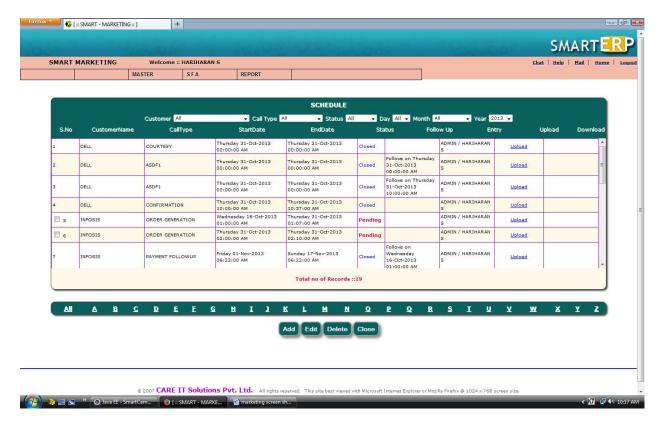
This is **Daily calls** view screen. We can **add**, **edit**, and **delete** the Daily calls.

To add a new **Daily calls** by click the **add** button

To edit Daily calls by click the edit button

To delete **Daily calls** by click the delete button.

To filter **Daily calls** record by alphabetically, customer, call type, status, day, month, year.



### Add page

To add a daily calls by click the add button in daily calls view screen

Enter the customer, agenda, description, opportunity value.

Select call type, starting date, ending date, follow ons, follows date from, follow date to, new call type.

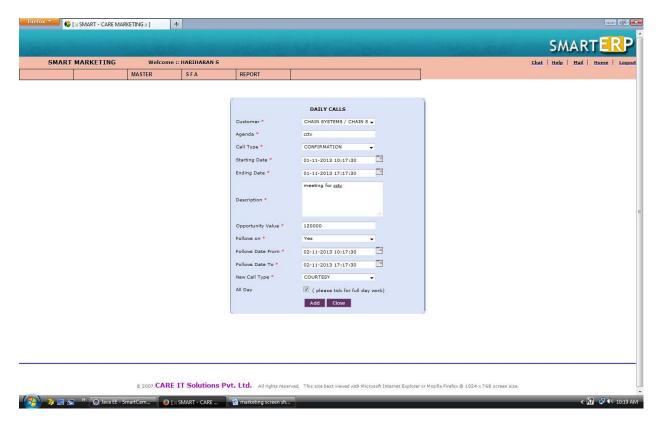
Check all day.

Click the add button.

The \* mark fields are mandatory

The \* mark fields validate when click the add button.

The daily calls added successfully.



#### **Edit page**

To edit a daily calls by click the edit button after select a record in daily calls view screen

Modify the customer, agenda, description, opportunity value.

Change call type, starting date, ending date, follow ons, follows date from, follow date to, new call type.

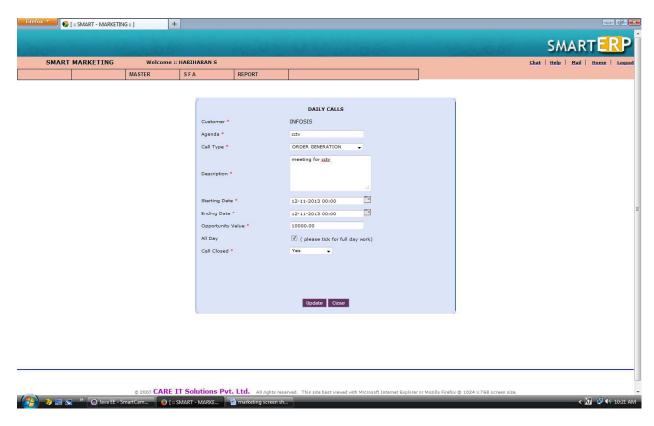
Check all day.

Click the update button.

The \* mark fields are mandatory

The \* mark fields validate when click the update button.

The daily calls update successfully.

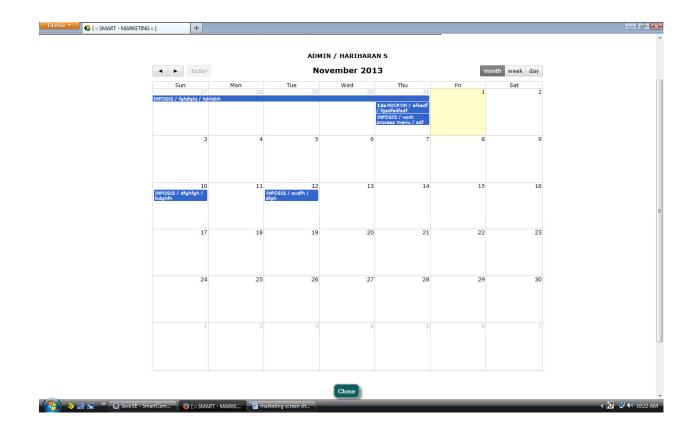


### Daily calls view

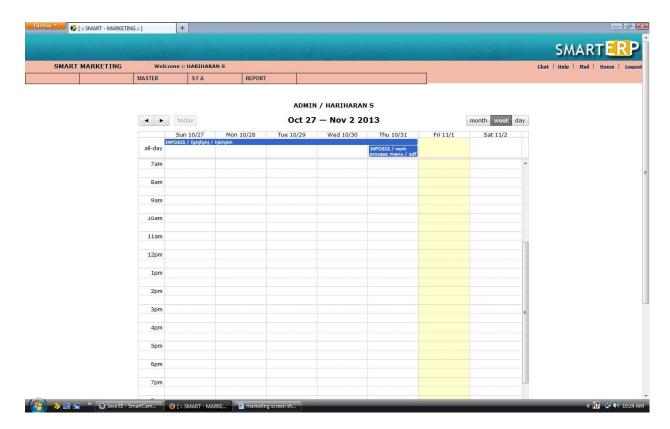
#### **Month**

This is **Daily calls view** screen. We can **remainder** the daily calls by using month, week and day.

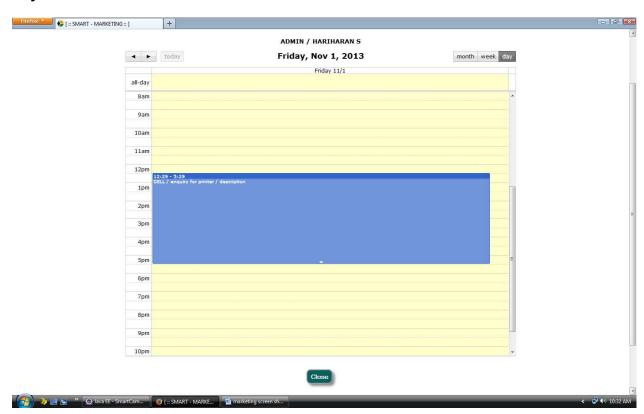
To view schedule information for daily calls by using day, week, month on calendar whatever record entry in daily calls .



### Week



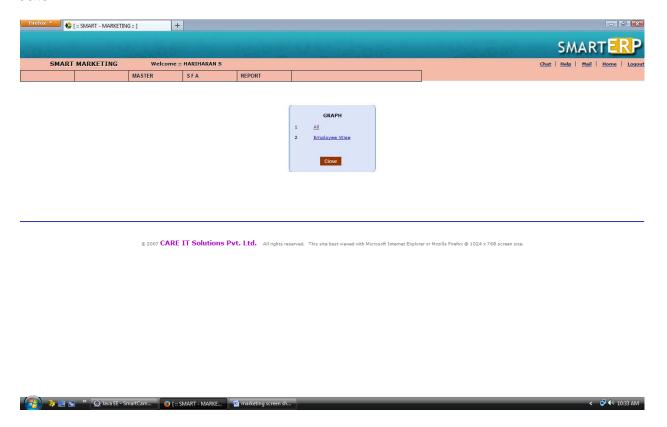
#### Day



## Graph

To Create graph based on all employee and employee wise.

To view pie chart report according the employee's daily calls by using start and end date



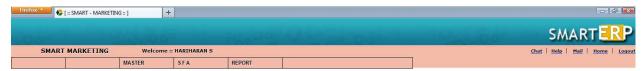
ΑII

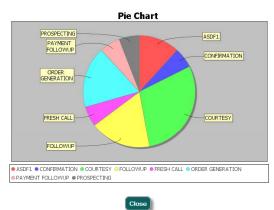


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#### Pie chart



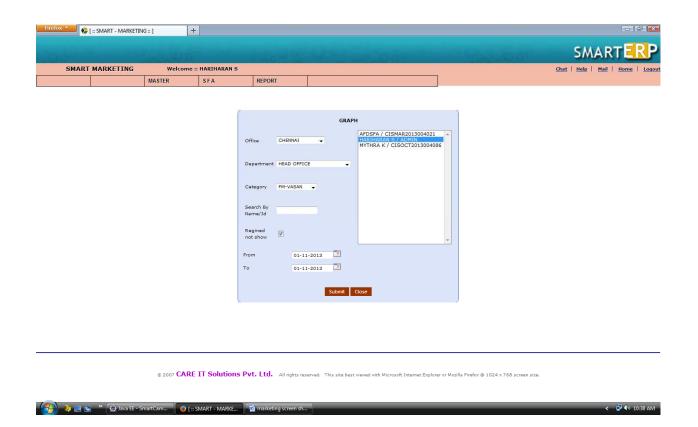


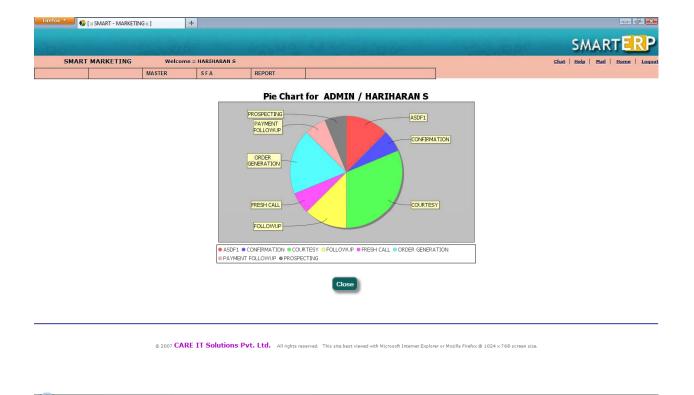
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## **Employee wise**

To create graph based on employee wise.

To view pie chart report according the employee's daily calls by using start and end date along with employee id.





### **Graph with value**

To create graph for opportunity value based on all employee.

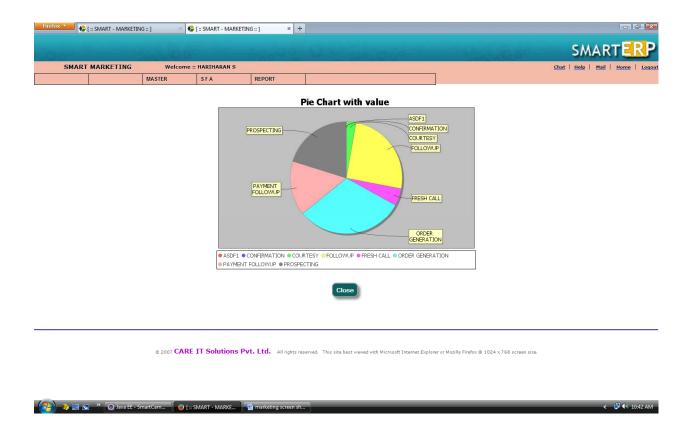
To view pie chart report according the employee's opportunity value of daily calls by using start and end date



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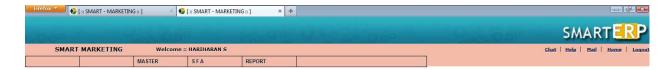
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## **Employee wise**

To create graph for opportunity value based on employee wise.

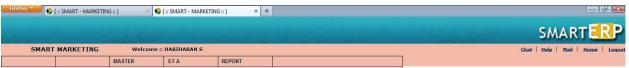
To view pie chart report according the employee's daily calls opportunity value by using start and end date along with employee id.

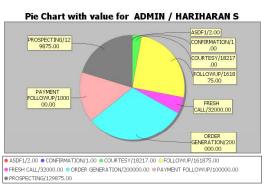




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Close

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## **Enquiry**

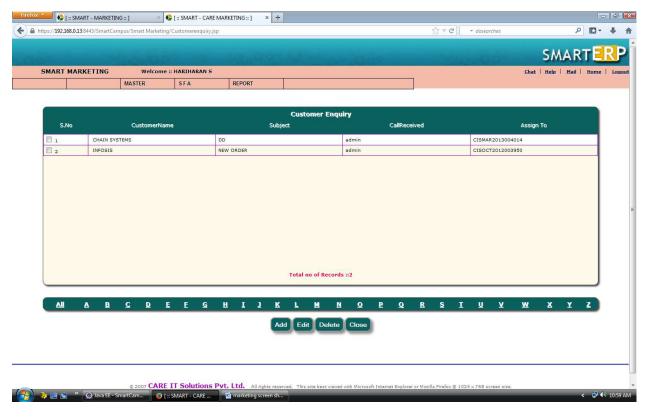
This is **Enquiry** view screen. We can **add**, **edit**, and **delete** the enquiry.

To add a new **enquiry** by click the **add** button

To edit **enquiry** by click the **edit** button

To delete **enquiry** by click the delete button.

To filter **enquiry record** by alphabetically.



## Add page

To add a customer enquiry by click the add button in enquiry view screen

Select the customer name.

Enter subject, description.

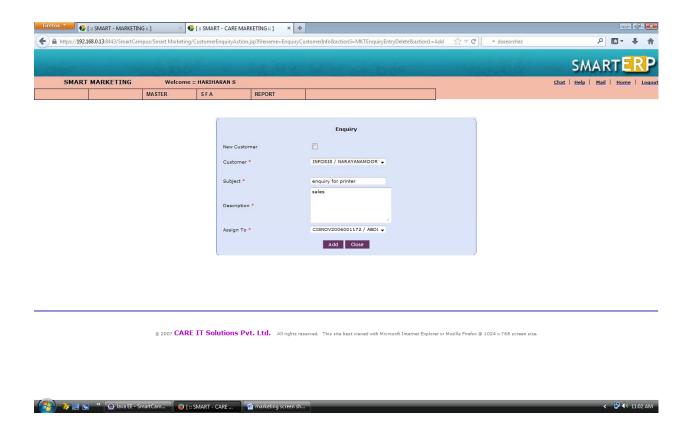
Select assign to.

The \* mark fields are mandatory.

The \* mark fields validate when click the submit button.

Click the Add button.

The Enquiry added successfully.



#### **New customer**

To add new customer by check the new customer.

Enter customer name, contact person, address.

Select country, state, district, city, pincode.

Enter the mobile, email, subject, description.

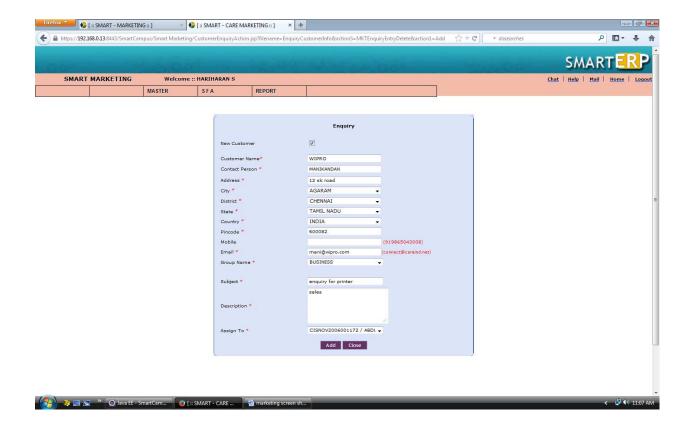
Select group name, assign to.

Click the add button.

The \* mark fields are mandatory

The \* mark fields validate when click the add button.

The enquiry added successfully.



#### **Edit page**

To edit a enquiry by click the edit button after select a record in enquiry view screen

Modify customer name, contact person, address.

Change country, state, district, city, pin code.

Modify the mobile, email, subject, description.

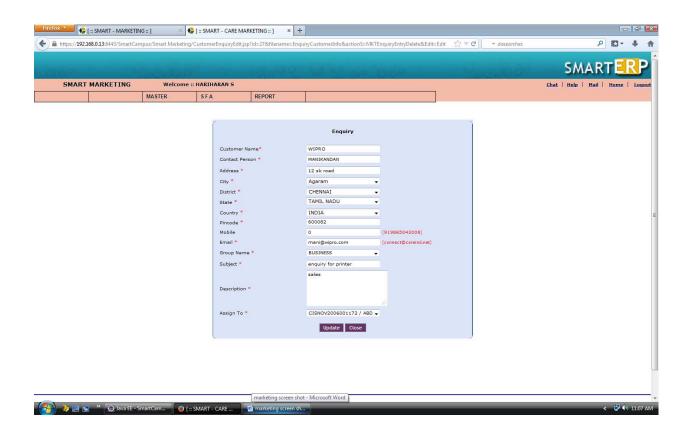
Select group name, assign to.

Click the edit button.

The \* mark fields are mandatory

The \* mark fields validate when click the edit button.

The enquiry update successfully.



### **Remainder Entry**

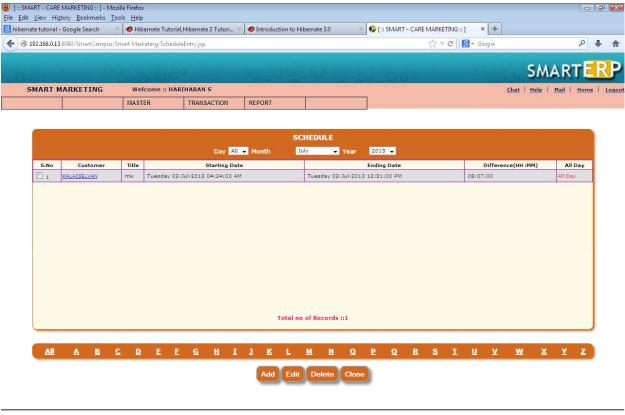
This is Remainder entry view screen. We can add, edit, and delete the entry

To add a new **remainder entry** by click the **add** button

To edit a **remainder entry** by click the edit the edit button.

To delete a **remainder entry** by click the delete button.

To filter remainder entry by using alphabetically, day, month, year.



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#### Remainder Entry add page

You want to add a schedule entry by click the add button in remainder entry view screen

Enter the customer name, title.

Select the starting date and ending date.

Tick the all day check box.

The \* mark fields are mandatory.

The \* mark fields validate when click the submit button.

Click the submit button.

The remainder entry added successfully.



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### Remainder Entry edit page

You want to edit a schedule entry by click the edit button in schedule entry view screen

Modify the customer name, title.

Change the starting date and ending date.

Tick the all day check box.

The \* mark fields are mandatory.

The \* mark fields validate when click the submit button.

Click the submit button.

The schedule entry update successfully.



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#### **Remainder View**

This is **Remainder view** screen. We can **remainder** by using month, week and day.

To schedule by click a day on calendar when remainder entry add page is open.

Enter the customer name, title.

Select the starting date and ending date.

Tick the all day check box.

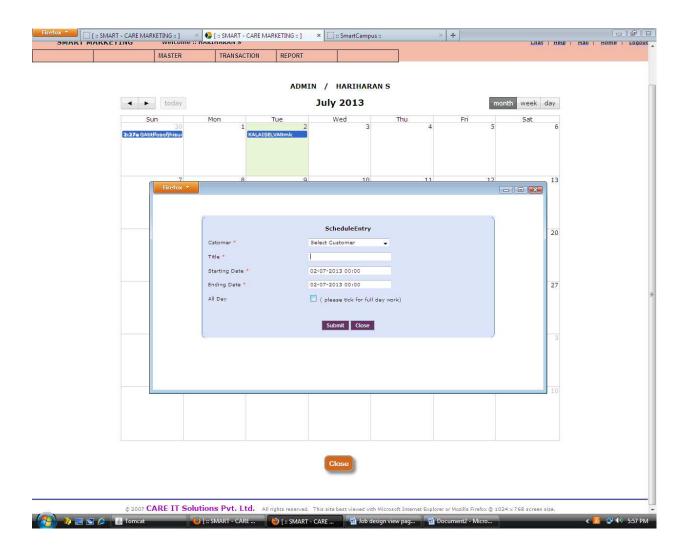
The \* mark fields are mandatory.

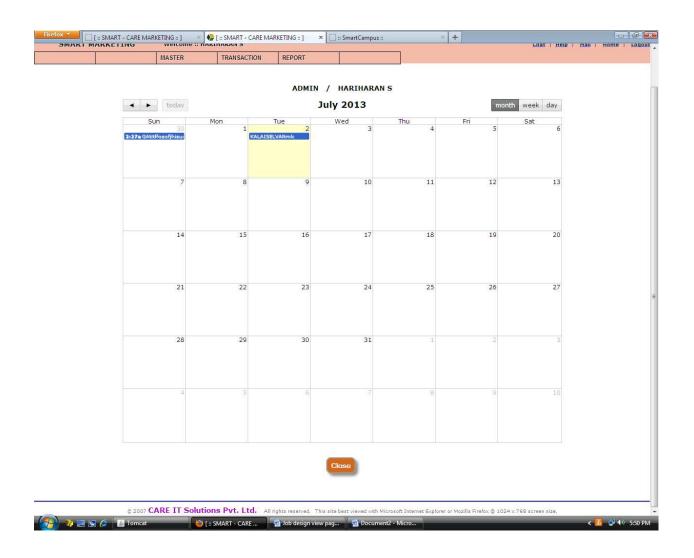
The \* mark fields validate when click the submit button.

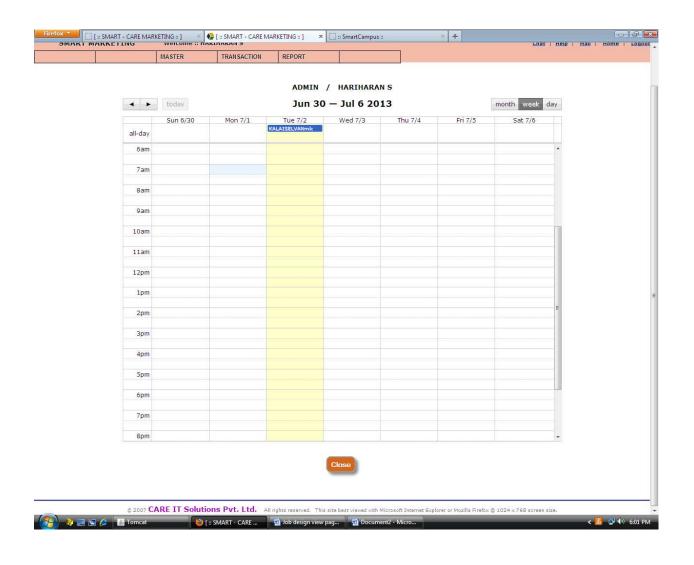
Click the submit button.

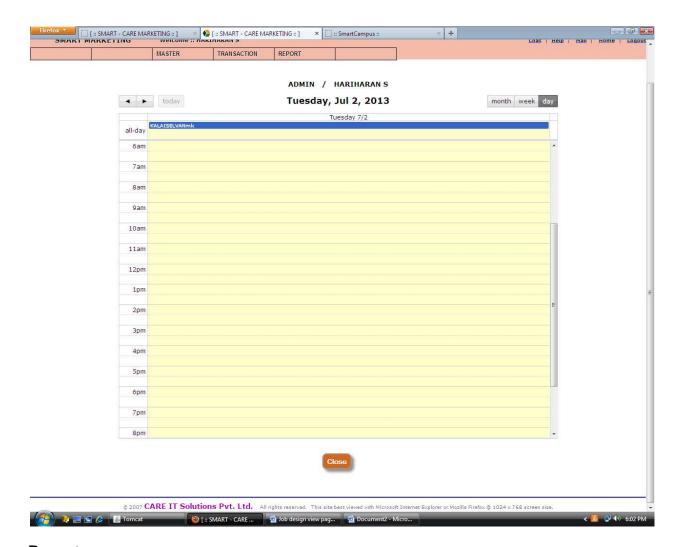
The schedule entry added successfully.

Schedule and title name link appear on the calendar.



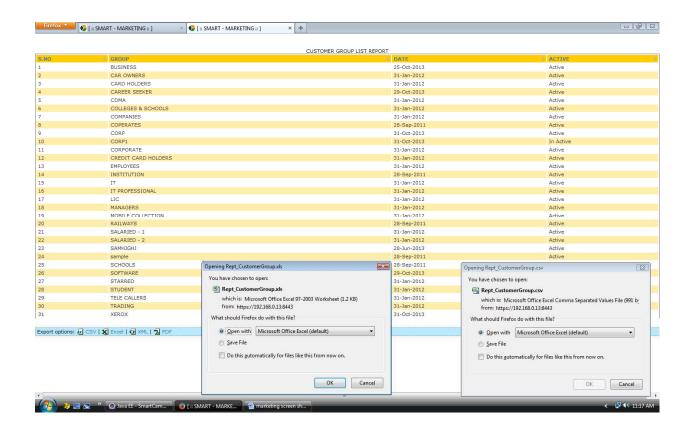




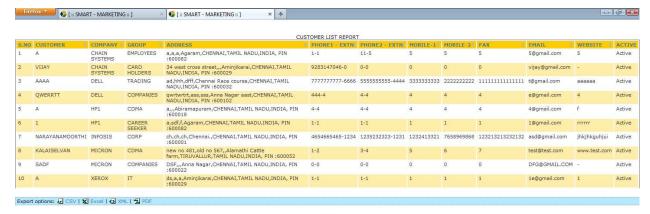


## Report

**Customer group** 



#### **Customer information**



CLOSE



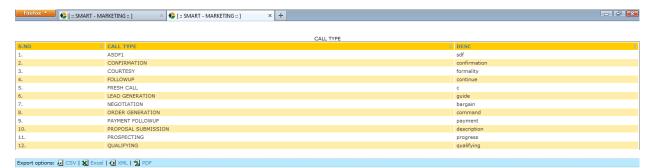
#### **Mobile contact**



CLOSE



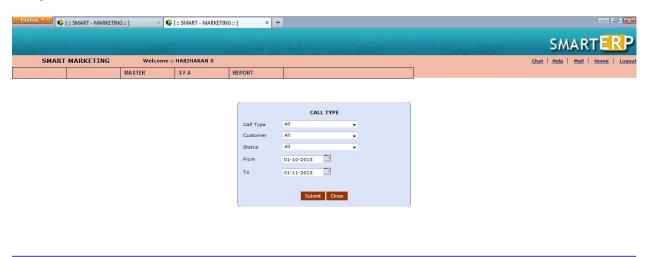
### Call type



CLOSE

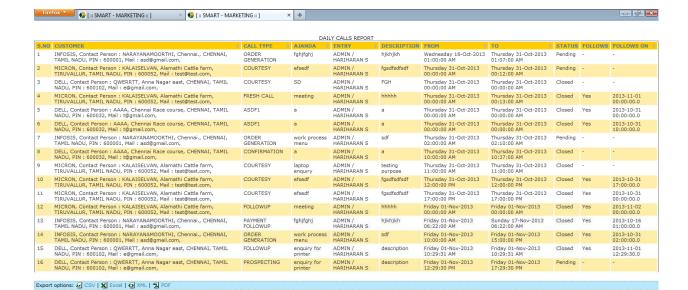


## Daily calls



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CLOSE

