Why is CRM required for MSMEs?

The MSME sector is a critical part of any economy, and it comprises a large number of businesses that operate in various industries. These businesses face many challenges, including intense competition, limited resources, and a constantly evolving market.

To stay competitive and grow their businesses, MSMEs need to build strong relationships with their customers. They need to understand their customers' needs, preferences, and behaviours and provide them with personalized and timely services. However, many MSMEs struggle to manage customer data effectively and efficiently, which can lead to lost opportunities, decreased customer satisfaction, and decreased revenue.

A CRM system can help MSMEs address these challenges by providing them with a centralized platform to manage customer data. By storing customer data in a structured and organized manner, MSMEs can gain insights into their customers' behaviours, preferences, and needs, which can help them tailor their services and improve customer satisfaction. A CRM system can also automate many of the routine tasks involved in customer management, such as lead tracking, sales forecasting, and customer support, which can save MSMEs time and resources.

CRM system can help MSMEs build stronger and more profitable relationships with their customers, which is essential for their long-term success.

Problem Statement:

Micro and small business owners struggle with managing customer data, resulting in missed revenue opportunities. There is a need for a low-cost and user-friendly CRM solution that can help MSMEs effectively manage their customer relationships, automate tasks, and boost revenue generation.

Process:

Menu 1:

Employee perspective

Customer perspective

Menu 2.1: Employee perspective

Role check and display

1. Admin: Has full access to all features and settings in the CRM system.
2. Manager: Can access and manage data for their team or department, but does not have access to all settings.
3. Sales Rep: Can view and manage their own leads, contacts, and opportunities.
4. Customer Support: Can access and manage customer support tickets and interactions.

Menu 2.2: Customer perspective

Customer -> add\_cust(), display\_cust(),update\_cust(), delete\_cust(), view\_profile()

Services -> add\_service(), display\_service()

Plan -> fixed, display\_plans()

Payment -> add\_payment(), disp\_payment()

Customer support -> support\_request(), display\_tickets(), update\_ticket()

Leads -> add\_lead(), display\_lead(), update\_lead()

Employee -> add\_emp(), update\_emp(), display\_emp()

User Management -> Fixed, display\_usermanagement()

add more services

30,Harshit,9687485337,harshit@gmail.com,Support,FULL TIME,R04

8,Ajay Tom,9930264423,ajaytom@gmail.com,Admin,PART TIME,R01

19902,Elizabeth,9089432955,eliza@gmail.com,Marketing,TRAINEE,R03

1. **Add Customer:** This function will add a new customer to the CRM with their details like name, phone, location, and the plan they have opted for.
2. **Add Service:** This function will add a new service to the CRM with details like name, price, availability, and the plan it belongs to.
3. **Add Plan:** This function will add a new plan to the CRM with details like name, duration, and the services it contains.
4. **Add Payment:** This function will add a new payment to the CRM with details like the payment date, amount, payment status, payment method, and the customer ID.
5. **Add Lead:** This function will add a new lead to the CRM with details like name, phone, source, and the employee who generated the lead.
6. **Add Employee:** This function will add a new employee to the CRM with details like name, phone, email, position, and the role they are assigned.
7. **Add User:** This function will add a new user to the CRM with details like their role, password, and status.
8. **Add Ticket:** This function will add a new support ticket to the CRM with details like the customer ID, issue description, and the employee assigned to handle the ticket.
9. **View Customer Details:** This function will allow you to view the details of a particular customer based on their ID.
10. **View Service Details:** This function will allow you to view the details of a particular service based on its ID.
11. **View Plan Details:** This function will allow you to view the details of a particular plan based on its ID.
12. **View Payment Details:** This function will allow you to view the details of a particular payment based on its ID.
13. **View Lead Details:** This function will allow you to view the details of a particular lead based on its ID.
14. **View Employee Details:** This function will allow you to view the details of a particular employee based on their ID.
15. **View User Details:** This function will allow you to view the details of a particular user based on their ID.
16. **View Ticket Details:** This function will allow you to view the details of a particular support ticket based on its ID.
17. **Update Customer Details:** This function will allow you to update the details of a particular customer based on their ID.
18. **Update Service Details:** This function will allow you to update the details of a particular service based on its ID.
19. **Update Plan Details:** This function will allow you to update the details of a particular plan based on its ID.
20. **Update Payment Details:** This function will allow you to update the details of a particular payment based on its ID.
21. **Update Lead Details:** This function will allow you to update the details of a particular lead based on its ID.
22. **Update Employee Details:** This function will allow you to update the details of a particular employee based on their ID.
23. **Update User Details:** This function will allow you to update the details of a particular user based on their ID.
24. **Update Ticket Details:** This function will allow you to update the details of a particular support ticket based on its ID.
25. **Delete Customer:** This function will allow you to delete a particular customer from the CRM based on their ID.
26. **Delete Service:** This function will allow you to delete a particular service from the CRM based on its ID.
27. **Delete Plan:** This function will allow you to delete a particular plan from the CRM based on its ID.
28. **Delete Payment:** This function will allow you to delete a particular payment from the CRM based on