**PROJECT EXPLANATION**

I have worked on a project, whose name was “BSGTECH”. It was basically from customer relationship management domain and a cloud based technology. This software makes very good coordination between customer and the organization. Also this software manages the data like stock , purchase. It gives the solution for sale, marketing and service.

The main purpose to develop the software was to handle the problem of the clint in electronic field. According to the clint, initially there was not such demand of his goods. So the clint ran his business in a small region. After that ,the demand of the goods increased slowly with the passage of time. The biggest challenge for client was how to sale the product ,maintain their data without stopping the sales . And the client did not want to lose his customer and also their accounts .So the client wanted to store the data in such a place that it becomes resourceful. That’s why the client needed a solution for it.

So these are the main reasons that we are involved in developing this project.

run the business smoothly, the project had major tabs like

* lead
* ACCOUNTS
* CONTACTS
* potential lead
* CAMPAIGN
* PRODUCTS To
* VENDORS
* PRICE BOOKS

Others are QUOTES, INVOICE, SALES ORDER and PURCHASE ORDER.

when we login the CRM application, homepage is displayed. The home page is designed in such a way that major tabs, task list, today’s events, snapshot and pipeline by stage displayed in the center of the home page .And search bar, clock, calendar, calculator were present in the left of the screen. In the top right side of the screen Zoho suite, skin, feedback, set up, help and logout were place. When click on the major tabs n numbers of minor tabs are displayed inside it, those are new account, new contact, new lead, new campaign, new potential lead, new task, new event and new forecast with recycle bin.

There are lots of similar operations which are present inside the major tabs like create, edit, clone, delete, print preview and convert.

Create: Filling all the details for the respective major object, when click on the save button we can create a new file for the object.

Edit: Here we can modify the pre existing file by clicking on the edit button for that respective major object and after modify the details then click on save button.

Clone: Here we create similar file for the existing major object by clicking on clone button and modify it after that click on save button.

Delete: By clicking on delete button, we can delete the existing file for the respective major object and that file displayed in the recycle bin.

Convert: Here we can convert the lead to potential lead by clicking on convert button. After that fill all the details and click on save button ,the lead get converted to potential lead.

Print preview: By clicking on the print preview button we see the preview of the file of that respective major before going for hard copy.

1.CAMPAIN : It allow you to move a forward step in sales and marketing process in the sequential order. Here we can, create new campaign, edit campaign, delete campaign, print preview a campaign and restore the deleted campaign. After perf

orming any above operation we can see that campaign in campaign list page. Also tasks and events are two more functions inside the campaign by which we achieve the campaign. Here tasks are official and events are unofficial.

2.Lead: Lead is the first important element by which we can move our business in forward direction. It is the basic details of an individual which is collected from expo , banner show, poster, road show etc. By using this details we can convert that lead to potential lead so that product can be sellable and improvement comes in the business. some lead are not showing interest in one product but their details is very much important to sell other product in the future. There are certain operations, for this lead like create, edit, clone, convert, print preview, delete. After this, we can see that lead in the list page.

3.Potential lead: A potential leads are persons who make the organization profitable and they have capable to buy the product. So when a individual is becomes a potential lead at first the company will create a account and a contact details of that person then the company will give, price book and specification of that product to that lead. We can directly create, delete, edit, and clone to potential lead. So after this operation the potential will visible in the list page.  
Contact: It is the way to communicate with an individual who becomes a potential. Also by this way company can send some offers, new arrivals and mainly the company will send those offers to the potential on which he has lots of interest. We can create the contact on those person who becomes lead to potential lead also with it we can perform delete, clone, edit operation. The created contact will displayed in the list page.  
  
Account: For every organization, account is the most important part. So here the company can track its selling, stocks and customer interest. Inside the account we can store the address, number, annual revenue and other details. Operations like create, delete, edit, clone, print preview can be performed on the account. The created account will be shown in the account list page.   
  
Product: products are the items, through which the company gets profit by selling it. The retailer is a mediator through which the product transfers from vender to customer. All this process is managed by CRM software. The operations are delete, clone, edit, print preview can be perform on the product. The created product is displayed in recent item and product list page  
  
Contact: It is the way to communicate with an individual who becomes a potential. Also by this way company can send some offers, new arrivals and mainly the company will send those offers to the potential on which he has lots of interest. We can create the contact on those person who becomes lead to potential lead also with it we can perform delete, clone, edit operation. The created contact will displayed in the list page.  
  
Account: For every organization, account is the most important part. So here the company can track its selling, stocks and customer interest. Inside the account we can store the address, number, annual revenue and other details. Operations like create, delete, edit, clone, print preview can be performed on the account. The created account will be shown in the account list page.   
  
Product: products are the items, through which the company gets profit by selling it. The retailer is a mediator through which the product transfers from vender to customer. All this process is managed by CRM software. The operations are delete, clone, edit, print preview can be perform on the product. The created product is displayed in recent item and product list page.

After creating successfully product, admin can create a price book for the product. For creating price book admin need to click on price book major tab, price book list page will be opened. Click on new price book and enter all the details like actual price, selling price and click on save button, so that price book details page will be displayed. After creating price book there is data flow to recent items and price book list page.

After creating price book, now admin can able to create quotation for product which is nothing but estimation of bill. So whatever offers he has provided to customer, he can enter in this quotation module. In order to create a quotation admin, need to click on quotation major tab, where quotation list page will be displayed. Here if admin want to create new quotation, then he need to click on new quotation button where in create quotation page will be displayed. Here he need to enter all details like to whom I am providing the quotation along with that I have to integrate with potential module why because I am generating quotation for particular potential. So that is why I need to integrate with potential module with quotation module. Also after integrating with potential and quotation module, I need to integrate the price book module and quotation module. And there is huge data flow from different list pages to create quotation page. So after entering all the details, click on save button. So here admin also have authority to create two order. 1st one is sales order and 2nd one is purchase order. In order to create sales order admin need to click on sales order major tab and sales order list page will displayed. Here I need to click on new sales order button, wherein create sale order page will be displayed. Enter all details and click on save button, sales order detail page will be displayed. where there is data flow to recent items and sales order page list page. In order to create purchase order admin need to click on purchase order major tab and purchase order list page will displayed. Here I need to click on new purchase order button, wherein create purchase order page will be displayed. Enter all details and click on save button, purchase order detail page will be displayed. where there is data flow to recent items and purchase order page list page. After generating two order which is sales order and purchase order, admin can generate invoice which is nothing but a final bill.

Final bill is nothing but after selling the product along with product customer need to generate final bill which is nothing but a invoice to the particular potential. So this is all about my project, do you want me to explain in detail?